

Detailed Project Report

Ver 1.0

Kerala Sports Economy Mission

Sporting, Fitness & Wellness Industry

Vol - I

Submitted To,

Kerala Sports Department



KERALA SPORTS STRATEGY FRAMEWORK

FEBRUARY 2022

Detailed Project Report

Ver 1.0

Kerala Sports Economy Mission

Sporting, Fitness & Wellness Industry

Vol - I

Submitted To,

Kerala Sports Department



KERALA SPORTS STRATEGY FRAMEWORK

FEBRUARY 2022

PREFACE

Sports is a multibillion dollar industry, and countries around the world are seeking ways to capitalize on this powerful tool for economic growth and development. Sports can be the stimulus for economic growth especially in emerging, open economies like India. Sports is an important sector of economic activity and spans Construction and maintenance of sports venues, Coaching, Organization of Events, Sales, Media, Manufacturing and Trade of sport products, Sports Tourism, Wellness, Fitness and Researches. It creates enormous job opportunities in core and allied segments as well. It also develops opportunities for business from Startups, SMEs to large corporates.

Sports is also a part of increasingly important leisure industry as such has broader benefits such as boosting productivity, individual and community development. It is reducing the burden of ill health on society. It contributed to maintain fitness, preventive health, manage obesity and to control lifestyle diseases.

It complements various sectors like Tourism, Culture, Health, Education etc. Sports and Physical activities enhance Employability, Emotional Quotient, Wellness, Mental Health and Productivity. Sports generates strong beneficial outcomes for society through Health, Social, Economic, Cultural, Behavioral, Attitudinal impacts and the Sports Industry is the economic representation of this, providing the inputs and coordination required for the Sport and recreation.

Economic growth and Employment generation is the direct impact while it has multidimensional influence and impact from health to tourism.

Directly Sports has contributed to the economy and it is reflected in GDP index, while it has also significantly contributed to the areas such as Health, Fitness and Wellness both in physical and mental aspects. And it will be reflected on the corresponding Indices.

Through this mission, we are trying to explore the economic aspects of sports and to increase the core economic outcome of sports and its allies. Here we try to define sports industry and its segments and also trying to mark its boundaries and to seek the possibilities to align few more areas. Fitness, Physical Activities, Wellness and Nutrition, Yoga and Mental Health are more connected with Sports and by giving better focus and thrust on these areas the canvas of sports can be increased. The sports sector will attain the strength and size required to develop an independent economy.

Sports sector development is much important in the overall growth of Economy in the backdrop of Covid 19 and related Socio- economic conditions.

DEFINING SPORTS ECONOMY

The Sports Industry in Kerala is diverse, covering a wide range of sport and recreation activities, and an even broader range of Economic activities. It covers the grass root participation in both organized sport and less formal recreation, through to the high performance and professional athletes and competitions held in major stadiums and broadcast on screens around the country. It includes, among other activities, the delivery of core sport and recreation services such as administration and training, the manufacturing and distribution of equipment and technology, and the delivery of sports medicine services. It also comprises with fitness, wellness and related activities and services.

The Sports Industry has not been well defined historically as a result of these complexities and attempts to estimate the economic contribution have focused on a narrow definition of both sport and related industry activity. The first challenge for the analysis was to develop a broader definition of Sport and the Sports Industry to ensure that the significant linkages throughout the economy are captured. Then, to further enable a robust analysis of the Industry, it has been divided into 25 Key segments based on the various goods, services and activities across the Industry. This facilitates a more in depth analysis of each segment in order to provide stronger evidence base for a potential growth plan.

I. Employment Generation

The jobs generated from the entire sporting activities through its Core, Allied and Complementary services and products to be included as a core economic output.

II. Non-Economic outcomes

It is important to note that the Sports Industry can also not be separated from the broader value that is generated by Sport and Recreation. Various recent reports estimated that the non-economic outcomes of the Sport and recreation (Health, Social, Cultural, Environmental domains) are at least as big as the economic contribution made. It is therefore important to any Strategy plan for Growth and any related analysis or evidence base, to be constructed with a view to continuing to support and grow these broader beneficial outcomes generated by sport and recreation.

III. Multi Dimensional Impact

The prime objective of Sports Economy Mission is to quantify the economic outputs and to make a broader calculation of its contribution to GDP. Definition, Segmentation, Data, and analysis of the sector is being done to develop a framework. On the completion of the primary assessment and the corresponding inputs solid projects, programmes and schemes are suggested for a rapid growth of the sector. It is projected and the roadmap is prepared. As mentioned earlier the non economic impact is also important that may be occurred through the new approach. It is essential to quantify it with available or new parameters. Sports Economy Mission is not just completed with the GDP calculations, it is an effort to explore the multi dimensional aspects of Sports through an Industry/ Economy approach.

SCOPE OF THE FRAMEWORK

It's an ambitious mission to develop Sports as an important part of the nation's economic activities and as a contributing sector in GDP. In a global perspective, sports has been matured enough to stand out independently and contribute to the Economy of different countries. As a fast developing country, India has to give great prominence for such emerging sectors. The State of Kerala is stepping into this area as a frontrunner in the Country.

➤ **Sizing the Economy**

To develop any economy in a progressive way, certain processes are required. Sizing the economy is the most important part of it. To quantify an economy, data from different levels are essential. As Sports is comparatively a new area which is emerging as an economic sector, identifying potential and revenue generating sectors and revenue streams are really important. We have identified major revenue streams specifically. About 25 major segments and corresponding micro segments are spotted for this value assessment. About 227 micro segments were identified and an assessment was done on each segment. This study was done with the available secondary data and assumptions, which is based on approximate figures. A detailed micro level assessment through a thorough Survey process is suggested to the fulfilment of such an initiative to build an Economy, especially to measure the exact size. Detailed geographical mapping of the current assets in root level is also an important phase of this mission.

➤ **Core Strategy**

In the later phase of sizing we have gone through the basics in detail and the core strategy has been developed. Participation, Convergence, Collaborations, Segmentation, Exposure, Quantification and Industry approach are fixed as basic pillars. The Sports Economy Mission has been developed with these core elements. Considering this core elements and the Segments including micro segments the implementation strategy is being developed. Segment wise detailed implementation strategy and plan is also prepared. The roadmap for the same is also framed with the phase to phase implementation plan. The basic impact assessment and the process chart is also plotted. This Sports Strategy Framework represents the first step towards the Growth plan focusing on Economy with a clear objective of Defining and Analysing Kerala Sports Industry to provide the foundational evidence for the potential development of the plan.

Project Modelling, Analysis of models and Case studies are necessary to complete the entire flow of Sports Economy Prototype. In certain areas detailed process mapping is suggested.

This DPR is a compilation of Vision, Components, Strategy, Mission, Roadmap, Plans and Impact Assessment. Detailation of Projects, Programmes and Schemes in each segments and in General with specific projections are included. Also the targets and timeframe has been suggested. The cost estimation also provided with the basic assumptions. The preparatory programmes, Survey, Geographical Mapping, Communication etc are suggested with the progress of the mission.

TABLE OF CONTENT

1. SPORTS ECONOMY DEVELOPMENT- KERALA MODEL.....	07
2. KERALA HEALTH MODEL.....	09
3. ANALYSING SPORTS ECONOMY.....	11
4. SPORTS KERALA- A HISTORICAL OVERVIEW.....	16
5. ECONOMY- DEFINITION, APPROACH & EVOLUTION.....	24
6. THE DEVELOPMENT INDICES.....	26
7. SPORTS ECONOMY MISSION.....	31
8. STRATEGY.....	32
9. RELEVANCE.....	38
10. IMPACT.....	39
11. APPROACH.....	40
12. FINANCIAL VIABILITY.....	41
13. GLOBAL SPORTS INDUSTRY.....	43
14. SPORTS INVESTMENT IN INDIA.....	45
15. SPORTING CANVAS.....	49
16. GEOGRAPHICAL MAPPING.....	52
17. PREPARATORY EVENTS.....	54
18. THRUST AREA.....	55
19. PHASES.....	57
20. SEGMENT ANALYSIS.....	58
21. SPORTS ECONOMY SIZE.....	93
22. PLANS, SCHEMES & PROPOSALS.....	94
23. OUTCOMES.....	108
24. PHASES & EVOLUTION.....	110
25. ROADMAP.....	111
26. CONCLUSION AND PROCESS SUMMARY.....	112

Any development process that is proposed to Kerala shall be better analysed or studied along with a basic learning of the Kerala model of development. Historically Kerala has given more prominence to Social Growth indicators than GDP or Per capita income. But now the state has adopted a balanced view by taking social growth indicators along with economic parameters into account.

Kerala has always been ahead of other Indian states in various aspects of development especially in the aspects of Social development. When we plan to develop an Economy based on Sports, Fitness and Wellness the basic development arena of the state is a considerable factor. This social development has created a strong foundation for many missions, projects and schemes.

The **Kerala model of development** refers to the economic practices adopted by the state of Kerala. It is characterised by results showing strong social indicators when compared to the rest of the country such as high literacy and life expectancy rates, highly improved access to healthcare and low infant mortality and birth rates. Despite having a lower per capita income, the state is sometimes compared, at all metrics, to developed countries. These achievements along with the factors responsible for such achievements have been considered characteristic results of the Kerala model.

More precisely, the Kerala model has been defined as:

- A set of high material quality-of-life indicators coinciding with low per-capita incomes, both distributed across nearly the entire population of Kerala.
- A set of wealth and resource redistribution programmes that have largely brought about the high quality-of-life indicators

This Kerala model of development keeps the state on top of the Human Development Indices of India till now. In the areas of Healthcare and basic education the State has made a leap and is continuing. The Kerala model of development has reflected in life expectancy, low infant mortality, healthy life span and health infrastructure. Kerala has provided with excellent resources to the whole world in healthcare especially in Nursing. Kerala also produces excellent Doctors and other healthcare professionals. When it comes to the healthcare infrastructure the State has excellent facilities starting from the root level. The Govt sector has substantially improved in recent years. The private sector is doing extremely well during last few decades.

Kerala is at top on basic education including primary, secondary and higher secondary segments. The basic literacy level is also high compared to other states. Now Kerala is upgrading the literacy on Digital and Financial aspects.

There are many setbacks too in the Kerala Model and its economy while focusing more on these aspects. Lack of Industrialisation is a major defect of the approach.

It's time to redefine the Development concepts and to make proper alterations from ideology to implementation. We have to identify more areas of Growth. Sports, Fitness and Wellness is an area where more focused approach is timely and essential.

When the Sports Economy Mission is presented, the concerned the Kerala Model Development and its achievements and drawbacks are also to be analysed properly.

Even in healthcare, we are facing lot of critical issues including the fast spread of Viruses, the lack of prevention capacity of people and the threat of lifestyle diseases. As a consumer society Kerala can expect the challenges of lifestyle diseases.

In Higher Education Kerala is still lacking in achieving and maintaining the standards.

1.1. Sports Economy Development- Another Kerala Model

The Sports Economy Mission is also such an initiative first time in India and can be pitched as another Kerala Model. The non economic outcome of this process is expected to create more impact and is all aligned with human development indices and parameters. The mission can contribute to Health, both physical and mental of individual and the community as a whole. It will keep Kerala on top of the Health Indices through an organic way. Also, it will help Keralites to lead healthy and better living practices. Subsequently it can be added as a component of Kerala Model in future.

1.2. Adaptation of Kerala Model in Sports Economy Framework

The Sports Economy is adapted the values, philosophy and ideologies of Kerala model of development. Sports for all/ All inclusive sports is the basic pillar of this framework. The participatory approach is applied on resolving all problems that is identified during the analysis. Sports for Change is considered not just as a tagline but the soul of this entire project.

“Health is a state of complete physical, mental and social well being and not merely the absence of disease or infirmity” (WHO 1948)

2.1. Health- A top priority to Kerala

Kerala has achieved better health standards comparable with the developed nations in the world. Our health indicators like Infant Mortality Rate, Maternal Mortality, Birth Rate, Death Rate, Life Expectancy, etc. are far better than other states in India and are comparable to the developed nations in the world. *Kerala's achievements in health along with the low per capita income is termed as “Kerala model of Health”*. Higher level of education, especially female education, increased health consciousness, political commitment, etc. have contributed to the high achievements in health. Health at low cost, easy accessibility and availability even to the poor sections of the society, etc. are the characteristic features of the Kerala model of health. But the famous Kerala model of health has been facing crisis after the 1980s.

2.2. Concerns during recent times

The entire state is facing some serious issues in the healthcare system. We have enough and more hospitals, medical colleges, research centers, labs and pharmacies. There is no shortage of healthcare professionals as we are even contributing them to the world.

But the entire state is lacking when it comes to the natural immunity against diseases and it causes wide spread of viruses. When it comes to Covid scenario Kerala is affected badly and it raises as a serious concern. The state administration has fought at its level best. But could not control the spread effectively even after the effective vaccination in the first round. Serious studies are happening in various levels to identify the root cause. The incidence of communicable, noncommunicable, lifestyle and chronic diseases have created problems in our health system.

The famous Kerala model of health is now suffering from various challenges. The decay of the public sector leads to the growth of privatization of health care in Kerala. The high incidence of communicable and non-communicable diseases creates problems in our health sector. The attacks of communicable diseases like fever, dengue, chikungunya, H1N1, etc. lead to more hospitalization and death in Kerala. The increase in health care cost leads to high out-of-pocket expenditure and poverty.

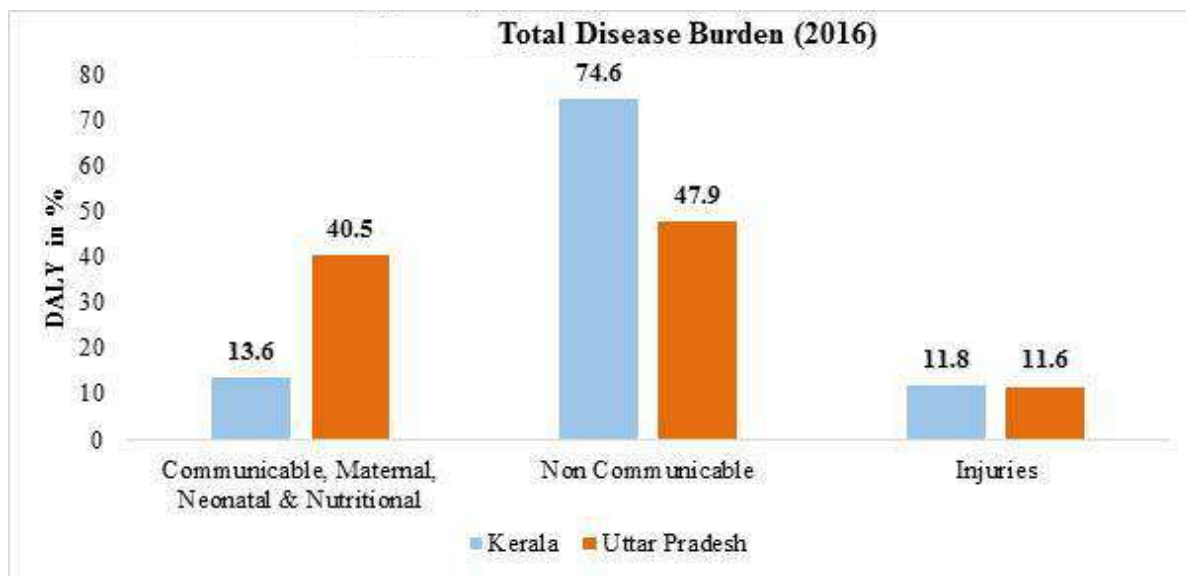
2.3. High Morbidity and Low Mortality

Kerala is in the final stage of the demographic transition in which both birth rate and death rate are low.

Though mortality rate is low, morbidity rate is very high in Kerala. Morbidity means a state of disease. The change in lifestyle, unhealthy food habits, lack of exercises, pollution, change in climate conditions etc. have increased the morbidity rate in Kerala. The Kerala Development Report 2008 found that Kerala's morbidity rate is twice the all India average. The characteristic feature of Kerala's morbidity is that it is higher in rural areas than urban areas. The morbidity pattern by age and residence suggests that, in Kerala rural morbidity-both acute and chronic-is higher than urban morbidity for all age groups. Acute morbidity is significantly higher in Kerala among the young (0-14 years) and the productive age groups (15-59 years) but among the elderly (60+ years), acute morbidity is low. Unlike acute morbidity, chronic diseases increases with age and is higher in both rural and urban Kerala than other states. (Kerala Development Report 2008)

2.4. Incidence of Communicable and Non-Communicable Diseases

Kerala is experiencing a huge burden of communicable and non-communicable diseases. Many diseases which are eradicated earlier have re-emerged. A communicable disease is an infectious disease transmissible by direct contact with an affected individual or the individual's discharges or by indirectly through a vector. It is also called contagious disease. Kerala is witnessing an increasing burden of communicable diseases. The emergence of Dengue, AIDS, Malaria, Leptospirosis, Hepatitis, Chikungunya and H1N1, etc. has led to the increase in morbidity and mortality.



A non-communicable disease (NCD) is a medical condition that is not caused by infectious. NCDs are otherwise known as chronic diseases which last for long periods of time and progress slowly. NCDs are the main cause of death globally. Major non-communicable diseases in Kerala are cancer, cardiovascular diseases, diabetes, hypertension, chronic kidney diseases, etc. Non-communicable diseases are driven by forces that include rapid unmanaged urbanization, and unhealthy lifestyles. In Kerala, the incidence of non-communicable diseases is higher than communicable diseases.

2.5. Increase in Health Care Cost

The most important challenge, facing the Kerala's health sector is the increase in health care cost. The main cause of this cost escalation in health is increased privatization, commercialization of health care, indiscriminate use of technology and the rise in drug prices. Kerala is in the last phase of the demographic transition and health transition with increasing life expectancy. Since the population has proportionally contained more elderly, it exhibits a low mortality and a high morbidity pattern

2.6. How Sports, Fitness and Wellness contribute

"Health is a state of complete physical, mental and social well being and not merely the absence of disease or infirmity"

Healthcare is an inevitable factor in our life. Healthy people can live more, work hard, and can save more. Health and wellbeing are the important elements for longevity. The maintenance of health is more complex and expensive. Improvement in the health status of people is one of the crucial areas in the social development of a community. This could be achieved by improving the access to health services. Regular Sporting/ Fitness/ Physical Activities reduces the risk of lifestyle and other diseases. It provides organic resistance. It also reduces the expenditure of the Individual and the State for healthcare. This can be proved with case studies, by creating index like 'Obesity Index' and through sector assessments.

The Sports Economy Mission is conceptualised *prima facie* to contribute to the Economy of the state through its GSP. A thorough assessment has been made on the Economy of Kerala and its three layer contributors. Certain new sectors (comparatively new) are the major contributors of Kerala Economy like Tourism, IT, Knowledge etc. Its a comparative study of Sports sector with other major components to assess the potential of growth in the present and future scenario.

3.1. Kerala Economy

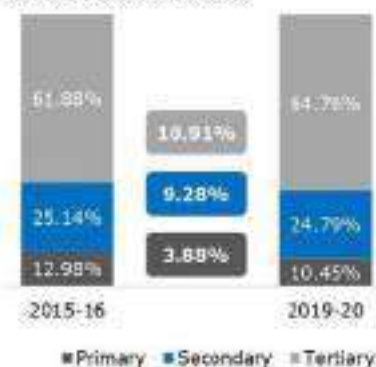
The *economy of Kerala* is the 9th largest in India, with an annual gross state product (GSP) of Rs 9.78 lakh crore (US\$131.98 billion) in 2020–2021. Per-capita GSP of Kerala during the same period is Rs 205,484 (US\$2,773.08), the sixth largest in India. In 2019–20, the tertiary sector contributed around 63% of the state's GSVA, compared to 28% by secondary sector, and 8% by primary sector. Kerala's high GDP and productivity figures with higher development figures is often dubbed the "Kerala Phenomenon" or the "Kerala Model" of development by economists, political scientists, and sociologists.

Source : IBEF Reports/state wise

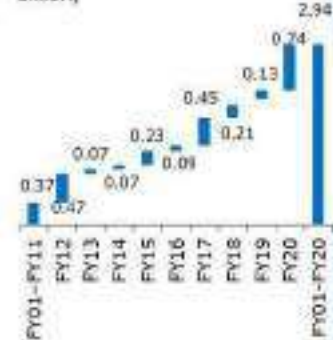
GSDP of Kerala at Current Prices



GSVA Composition by Sector at Current Prices



FDI inflow in Kerala* April 2000 - March 2020 (US\$ billion)



Note: ^ CAGR in Rs; P- Provisional; E- Estimate; AE- Advance Estimate; GSDP - Gross State Domestic Product; GSVA - Gross State Value Added. Source: Directorate of Economics and Statistics of State, Department for Promotion of Industry and Internal Trade (DP&IT)

This phenomenon arises mainly from Kerala land reforms, social upliftment of entire communities initiated from the first democratic government of Kerala led by E. M. S. Namboodiripad and subsequently implemented by various governments ruled the state. Kerala's economy is primarily based on the concept of "democratic socialist welfare state". Some, such as Financial Express, use the term "Money Order Economy". Kerala is the second-most urbanised major state in the country with 47.7% urban population according to the 2011 Census of India, and has tried to maintain a pan-state economy rather than concentrating in some selected cities to develop. Kerala is the second-least impoverished state in India according to the Annual Report of Reserve Bank of India published in 2013, only after to Goa.

Kerala, which accounts for 2.8% of India's population and 1.2% of its land area, contributes more than 4% to the GDP of India. Thus, the southern states per capita income is 60% higher than India's average.

This has fuelled internal migration to Kerala for low-end jobs, even as Keralites have emigrated—mostly to the Gulf countries—in search of better-paying jobs. Around 3,000,000 Keralites are working abroad, mainly in Persian Gulf; to where migration started with the Gulf Boom. The Kerala Economy is therefore largely dependent on trade in services and resulted remittances. In 2012, the state was the highest receiver of overall remittances to India which stood at Rs. 49,965 Crore (31.2% of the State's GDP), followed by Tamil Nadu, Punjab and Uttar Pradesh. The Migrant labourers in Kerala are a significant workforce in industrial and agricultural sectors of state. Kerala's economy was gradually shifting from an agrarian economy into a service-based one during the period between 1960 and 2020.

ECONOMIC SNAPSHOT



High economic growth

At current prices, Kerala's total GSDP stood at Rs. 876,283 crore (US\$ 119.93 billion) in 2021-22, an increase of 1% over FY20. Kerala is the leader in rubber production and high demand of rubber has opened immense opportunities for the state in the rubber industry.



Rich pool of skilled labour

Kerala has a large base of skilled labour, making it an ideal destination for knowledge-intensive sectors. The state has the highest literacy rate in the country.



Leader in tourism

In 2020, 4.99 million domestic tourists and 0.34 million foreign tourists arrived in Kerala. BBC Travel survey has rated Kerala as the top favourite tourist destination among foreign travellers.



Policy and infrastructure support

Kerala has a wide range of fiscal and policy incentives for businesses under the Industrial and Commercial Policy and has well-drafted sector-specific policies. In October 2020, Kerala's first and nation's twentieth mega food park was inaugurated in Palakkad district. The park is expected to create ~5,000 direct and indirect jobs and benefit ~25,000 farmers.

KEY GOVERNMENT POLICIES AND OBJECTIVES



Scheme for fixed floor price for vegetables

In October 2020, price of the floor was fixed at 20% above the cost of vegetable production.



Total digitalisation of school education

To improve the quality of school education, programmes such as 'High-tech School' and 'High-tech Lab' were launched and successfully integrated.



Vyavsaaya Bhadratha Package

For speedy and transparent delivery of concessions, including interest subsidies for the revival of MSMEs.

GOVERNMENT VISION -2030 FOR THE STATE



Industry

Increase the share of manufacturing to 10% of the GSDP by 2030.



Health

Increase health expenditure to GSDP ratio from 0.6% in 2012 to 4-5% by 2027-31.



Education

Create a global brand name in education and develop into a knowledge hub by 2030.



Energy

Exploit the full potential of hydro-electric generation and provide affordable and clean power to all.

3.2. Unique Features, Opportunities

The time Kerala became a state in 1956, it was one of the poorest regions in India. Today it is one of the richest Indian states and also the one that is best placed to achieve developed-country living standards in the near future. Central to this remarkable transformation has been the high level of social expenditure undertaken by state governments in Kerala over the decades. The interventions by the government worked in

tandem with the activities of political parties, trade unions, community organisations and the media, richly illustrating the power of public action to bring about development transformation.

By the 1970s itself, Kerala had made commendable progress in the areas of land reform, general education, and public health, and in reducing caste and gender inequalities. These achievements came in spite of the low level of per capita income of the state at that time . A number of scholarly studies have traced the development journey that Kerala followed . Some of them even have referred to it as a “model”. Pointing to Kerala’s experience, Amartya Sen argued that the expansion of substantive freedoms—to lead a healthy life, to gain education, and to participate in political discussions—does not have to wait till incomes reach a high level.

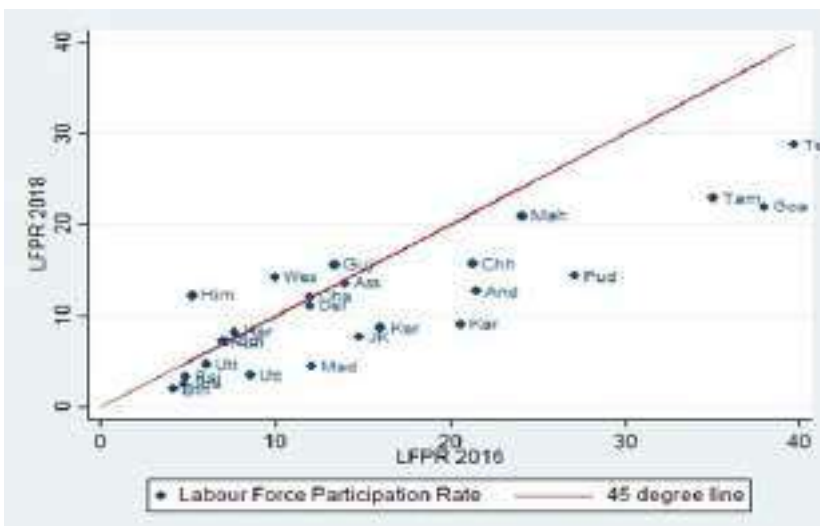
Kerala’s economy accelerated in the late 1980s and continues to grow rapidly even today. The Kerala experience distinguishes itself not just because social development preceded economic growth but also because social development provided the stimulus for a faster and qualitatively better economic growth.

3.3. Coping with new challenges

As Kerala enters the third decade of the 21st century, it faces a unique set of challenges. The size of the working age population in Kerala is set to decline between now and 2031—almost two decades before such a decline is to be registered at the national level. While the state has to grapple with the problem of an ageing population, it also has to guard itself against a regressive slide into inequality. Kerala has to seek new sources of economic growth in sectors that can meet the job aspirations of educated citizens of the state. At the same time, many sectors of Kerala’s economy report labour shortages, especially of manual and less-skilled workers.

While the inclusive nature of development in Kerala has benefited everyone, including communities and groups that faced historic disadvantages, the gains of education have not been evenly distributed. In particular, people belonging to the Scheduled Tribes, the Scheduled Castes and the fishing communities have lagged behind the rest in educational and professional attainments.

In Kerala, the labour force participation rate (LFPR) of females is low—31.9% compared with 78.9% for men. But the female LFPR in Kerala is better than the national figure (25.3%; figures for 2017-18, for population in the age group of 15-59 years). This is despite that, in Kerala, female workers outnumber male workers in health and education, and have a significant presence in some other sectors too, such as public administration and professional services. Women from Kerala have also migrated in large numbers for employment— notably as nurses—to other states of India and to foreign countries. The low female LFPR in



Kerala, despite the progress achieved by the state in many gender-related aspects of development, highlights two important issues. First, the state is not generating an adequate number of job opportunities for the educated, especially regular jobs that can provide decent incomes. The “discouragement effect” that this may have created in the labour market has been particularly severe on women.

Second, gender-based disparities continue to exist in Kerala at the workplace, as they do within families and in society at large (Eapen and Kodoth 2002).

Workers who are short-term migrants from states such as Assam, West Bengal, Odisha, Bihar, and Uttar Pradesh fill the gaps in Kerala's labour market, mainly as casual workers in construction and manufacturing, and also, increasingly, in selected service sectors such as in restaurants, hair-cutting saloons, and beauty parlours. Estimates suggest that the size of this migrant workforce in Kerala could be as large as three million. Migrant workers in Kerala in the construction sector earn as much as Rs.1,000 a day, almost twice the corresponding wage rate in, say, Delhi.

3.4. An agenda for the future

In response to the emerging challenges, Kerala has taken steps to deepen the gains of social development and to broaden their reach. The state government has invested in new-generation public schools over the last few years, and, as a result, enrolment in government schools went up significantly after 2017-18. The quiet determination with which the public health system in Kerala fought off—the Nipah virus in 2018 and is currently fighting the Covid-19 pandemic has earned it respect worldwide. Among the high points in Kerala's fight against the Covid-19 pandemic have been interventions made by the state government to protect lives and livelihoods. "No one should go hungry" became the battle cry of the administration and civil society alike during the lockdown periods (just as it had been in the wake of floods in August 2018).

3.5. Emerging new potential areas

Kerala sees future growth possibilities in healthcare, life sciences, biotechnology, pharmaceuticals, space and aeronautics, Ayurveda, Wellness, Sports, Physical Activities and AI.

Kerala faces immense challenges in transforming itself into a modern economy. The possibilities for knowledge-led economic growth in the state were outlined. Some of the sectors in which Kerala sees future growth possibilities include healthcare, life sciences, biotechnology, pharmaceuticals, space and aeronautical technologies, and artificial intelligence. The state also has to fully tap into its enormous potential in agriculture and agro-processing industries, as well as in petrochemical industries, port-based industries, ship building and logistics. Kerala is among the few states in India with four international airports and two major seaports).

An important agent of knowledge-driven economic growth in Kerala will be its universities and other academic and research institutions. Therefore, upgrading their capabilities will be a key policy priority. Kerala will have to draw on the talents of its youth coming out of higher education centres (166,000 enroll for tertiary education in the state every year, including 60,000 in engineering courses) as well as on its diaspora of high-skilled professionals worldwide.

The limited financial autonomy of the state government remains an important hurdle. This is mainly because of the nature of federal fiscal relations in the country with the Central government holding the power to collect a majority of the tax revenue. In 2019-20, the state's own tax revenue as a proportion of gross state domestic product was only 6.4%. Kerala will have to build institutions that can help mobilise the considerably large savings in its economy into investments that are needed for its future growth.

The freedoms and the relatively high standard of living that the people of Kerala enjoy today have been the result of decades of public action, set in motion by progressive social and political formations in the state. They have also been the result of the high level of social sector spending by state governments from the

1960s onwards. The Kerala experience points to the hollowness of the argument—reiterated time and again in India and other parts of the world—that government spending slows down economic growth. A related lesson from Kerala is on the role of wages. Rather than hurting the economy, higher wages for informal workers can help broad-base demand and speed up economic growth.

There are expectations that Kerala is now set to make a big leap in economic growth, building on its stock of human capital and the fund of goodwill it has accumulated over the years, while also making use of the opportunities available in this era of new technologies. Living up to these expectations will be a tall order for the Left Front Government in the state that has been re-elected for a second five-year term.

3.6. How Sports contribute- Making of a brave new Kerala

The primary and secondary sectors show a continuous decline on their participation and contribution in the Kerala Economy. There are many issues that resist the growth and development of Agriculture and manufacturing in the state. As being densely populated, there exist many obstacles in setting up big industries. Limitations are there for getting enough land for the manufacturing industries which need big size of land. Agriculture is no more an attraction for youngsters as price of commodities are declining day by day. We cannot ignore agriculture and manufacturing fully and concerned authorities are taking steps to tackle the same. But we need more potential areas of Growth. Service industries show marginal growth during last decades. Tourism marked an exponential growth. Govt is identifying such very potential sectors with long term vision. Sports, Wellness, Fitness, Physical Activity and Nutrition sectors are having exceptional potential in Kerala with a strong foundation of historical components. The state has a vibrant culture and a wide acceptance for the sector.

Knowledge economy mission which is an ambitious project of the govt is already rolled out to generate 20 Lakhs new jobs and 60 Lakhs people are getting equipped with new skills or upskilled their own skills. Sports Economy Mission is such an aspiration of the state to include and incorporate more sectors as a part of growth. The sector expected to play a pivotal role in making of a brave new Kerala.

Kerala has always been a mine of sporting talents that contributed dozens of Olympians for decades. The state contributed numberless national and international players in various sporting events. The state is considered as a recruitment ground of sporting talents to professional clubs, national institutions, departments and organisations. Generally Kerala is known for its passion and love towards sports whether it is Athletics, Football, Cricket or Volleyball. There is a pedigree of high performance and achievements in National and International levels.

4.1. Historical Overview

If there is some measure to analyse the overall performance in different aspects of sports across the states no doubt Kerala will keep its position at top as sure. But there is no such formal index so far. Through the Sports Economy Mission, Kerala is taking a path breaking initiative to measure the output, sizing the outcome of various sectors and its contribution to various indices especially towards GDP.

The position that the state occupied in the country was not happened all of a sudden. It's a result of various efforts taken by different stakeholders during last decades. The sports friendly environment and ecosystem was evolved through years.

4.1.1. The Champion State

PT Usha often called the queen of Indian Track and Field is an iconic representation of Kerala's sporting talent always. Keralites both Women and Men conquered the everest of Indian athletics for long years. MD Valsamma, Shainy Wilson, Anju Bobby George, Yohannan, Saramma, KC Rosakutty, KM Beenamol, Mayookha Johny and the list will extend upto 100 plus while taking the Track and field only. Kerala kept its position on the top in the Senior, Junior and Sub Junior levels for decades. There was no change in School Athletics and in University Meets. It was known as a factory of athletes produced naturally every year. It is not just the story of Athletics. Kerala gave birth to exceptionally brilliant players in Football, Volleyball, Basketball, Swimming, Badminton and even in Hockey and Cricket. Kerala has won the national championships of the popular games multiple times. Always Kerala has been a favorite for the major championships of popular sports. Subsequently the state has produced great coaches, officials and organisers in different disciplines. In the recent years there is a dip in the national level performances and few other states are challenging us including in our favorite items.

The top priority of Sports Economy Mission is to recoup the legacy of the state. Producing more talents is the core objective. Still Kerala is a mine of sporting talents and sculpting it properly is the challenge behind the mission. Basically the Spots economy circle starts with talents and ends with the achievements. All related activities such as events, coaching, branding and infrastructure comes in between the process. All other outcomes are complementary or supplementary.

4.1.2. Sports, Fitness and Physical Activity Literacy

The state of Kerala is highly literate on Sports and fitness. Its a positive outcome of fundamental education and the high consumption of media. The primary factor is of course the concern over health among people irrespective of age or gender. It has increased with the Covid related situations. The community is now well aware that the prevention is the best remedy than the treatments once affected by diseases. More and more people now get engaged in physical exercises and activities. People started walking, do cycling, running or swimming on a daily basis. It is estimated that 20 Lakhs people are engaged in physical exercises in either morning or evening as a routine. There are some positive results which has come out and is visible. It is proved that lifestyle diseases can be controlled with sporting or physical activities than medication or at least with the moderate usage of medicine.

Sports has become an attractive career option for the youngsters. Hundreds and thousands of players get placed through sports quota in Government and in private sector. Hundreds of players get recruited in professional clubs and in premium institutions.

It's an inspiring fact and statistics for the upcoming generation. The families even conservative ones strongly support the kids those who shows interest in Sports. They are very much aware of the opportunities along with the attached wealth, glamour and pride it generates. They have real stories in front of them from Cricket to Kabadi.

People understand the power of sports in skill development specifically physical skills that enabled them on getting jobs. The recruitments for Army, Navy, Airforce, BSF, CISF, CRPF, State Police Services and many more.

They are also aware of the positive outcome of sports as a recreational thing or a leisure activity that provide mental health and happiness which is essential for the well being.

Its sociological impact through the civic pride that generate in the community we live is also a positive outcome in participating in any form in any of the sporting events.

The Sports/ Physical Activity/ Fitness literacy is high in the state due to various reasons. The generally high literacy rates, good primary education standards and excellent health indicators are the major contributors to such an awareness on people.

Along with this these points are also considerable

1. A wide rage of sports are popular in the state.
2. The most sports enthusiastic community
3. Strong media penetration- Print, TV and Digital
4. High priority for sports in any mode of media.

4.2. The Backdrop

The history, heritage and culture of Kerala Sports is a strong foundation for building the Economy. Kerala stands the top among all other states while considering its achievements, aspirations and potential. Here are the Key Takeaways. It will give a clear vision for building strategies, plans, projects, programmes and schemes.

4.2.1. PT Usha

PT Usha is often called as the 'Queen of Indian track and field'. In the 1985 Jakarta Asian Championships, Usha won six medals - five gold and one bronze. She won the 100 m in 11.64, 200 m in 23.05, 400 m in 52.62, an Asian record, and 400 m hurdles in 56.64, with the final two coming in a span of 35 minutes. Her fifth gold came in 4 x 400 m relay, and a final bronze in 4 x 100 m. She set a record in the process for most gold medals

won at a single event in the history of the championships.

4.2.2. Athletics Powerhouse

There is no doubt for anyone who knows Indian Athletics history, Kerala is always a powerhouse of talents in both track and field and it continues. The state is continuously producing talents for last 5 decades and more. They used to compete in Olympics, World Championships, Asian Games, Commonwealth Games, SAF games and in National Championships.

4.2.3. The Feeder State

Kerala contributed numberless talents to various other states and institutions including Railways. It has acted as a feeder state. Railway teams were often filled with the Kerala talents especially in Volleyball, Basketball, Football and in Athletics. Even in the non popular sports items, Kerala has contributed lot of players.

4.2.4. Mecca of Volleyball

Kerala can be considered as a Mecca of Volleyball. In both Male and Female Volleyball Kerala contributed end number of talents since 50s. In national championships many times it was experienced that Kerala versus Kerala as many teams are with majority of Kerala players onboard. KSEB is the powerhouse of Indian Volleyball now. In the newly started Volley league, two Kerala teams are playing.

4.2.5. Jimmy George

Jimmy George is often considered as one of the greatest volleyball players of all time and was a member of India men's national volleyball team. He was the first Indian volleyball player to become a professional and played club volleyball in Italy. At age 21, Jimmy George was the youngest volleyball player to win the Arjuna Award. In his prime he was considered as one of the best attackers of the world.

4.2.6. Geethu Anna Jose

Geethu Anna Jose is an Indian basketball player who has been the captain of the Indian women's national basketball team. She has played during 2006 to 2008 in the Australian Big V seasons for the Ringwood Hawks, being the first Indian woman basketball player to play for an Australia club as a professional. In the 2008/9 season she was invited to play for Dandenong in the Australian Women's National Basketball League, but didn't take up the offer. In April 2011 WNBA teams, Chicago Sky, Los Angeles Sparks, and San Antonio Silver Stars invited her for tryouts. In June 2012, she scored 11 points in the finals of the third Asian Beach Games at Haiyang, helping India to achieve a 17–14 victory over China.

4.2.7. Santhosh Trophy

Santhosh Trophy is not just a championship but an emotion for Kerala. A championship win in Santhosh Trophy for Kerala is like a world cup win for a nation. When Kerala host Santhosh Trophy Championships, it was always conducted in fully packed galleries like and in a festive mood.

4.2.8. Universities and Colleges

MG, Calicut, Kerala and Kannur universities are always top in various sporting items in National levels. It includes Athletics, Football, Volleyball, Basketball, Handball, Badminton and Swimming. Many colleges produce excellent talents consistently and support the universities to continue the legacy. All major universities in Kerala gives much priority to Sporting activities and the physical education departments are very active. There is enormous potential for College sports in Kerala and it is a growth engine for the overall development of the sector in the state. The regularly performing centers are needed to build as Centers of excellence in National and International standards.

4.2.9. School Games

The School sports in Kerala always keeps its position on Top. In Athletics the state continue in the front row

for decades. The supremacy of the state can be seen in other popular sports too. Schools from different areas focuses on various sports contribute to continue such a legacy. Like the sports enthusiastic colleges, many Schools are performing exceptionally well for last many years. They also have the capacity to become Centers of Excellence in National and even International standards. The annual Sports & Games of Kerala is a mammoth sports fiesta and is considered as the largest sporting event in Asia while consider the number of participants.

4.2.10. The Champion Schools

The Koruthodu CKMHS was the national champions for long years under the coach KP Thomas. Kothamangalam Schools- St. George & Mar Basil continue the glory by winning National Championships for long. Schools from Palakkad (Parali, Kalladi and Mundoor) came up and challenged and give a healthy competition to the rest. This healthy competition between Schools is one among the reasons of emergence of potential student champions from Kerala Schools. Many more Schools with the support of Academies are emerging from different areas of the State.

4.2.11. World cup Football

For Kerala,Fifa World cup is not an event conducted in somewhere in the world. The football enthusiasts celebrate like anything and the football frenze is spread across the state on the season. It's a general trend that started with the Television telecast of the World cup. Before that the football lovers depended on Radio broadcast and Newspaper coverage to follow World cup Football.

4.2.12. Stunning Blasters Followers

Kerala Blasters, the ISL club of Kerala has become one of the top listed clubs in terms of its digital followers. They are competing with the legendary clubs in fan following. It has broken the records of even IPL Clubs. When the IPL club from Kerala, The Kerala Tuskers formed similar backup was given to them by the fan followers. Similarly, fan support of Sreesanth and more

4.2.13. Sreejesh the Icon

PR Sreejesh is an Indian professional field hockey player who plays as a goalkeeper and former captain of the Indian national team. Sreejesh played a vital role in the Indian national team's bronze medal win at the 2020 Summer Olympics. He won FIH Player of the Year Awards (2020-21) for best male goalkeeper. He is an icon of confidence and self belief on field and a true motivator to the generations.

4.2.14. Kerala Police

Kerala police Football Club is a part of Kerala's golden era in national Football. Many International players were risen from the police team and played for the state and the nation for long time. The list started from VP Sathyan, CV Pappachan, Kurikesh Mathew, IM Vijayan and many more. Apart from Football, Kerala Police maintained teams in Volleyball, Basketball, Athletics and in Swimming. And all these teams performed extremely well nationally for years. In few items Kerala Police had women teams also. The glory was diminished later due to various reasons.

4.2.15. Oh Premier Tyres

In the 70s, the Indian Football depended on a Kerala club and the glory of Premier Tyres widely spread all over the country. The Premier Football club won almost all major championships at the time. The club players became India's Internationals and played for the country. Later they move to India's most prestigious clubs like East Bengal, Mohun Bagan, JCT Mills etc.

4.2.16. Sreesanth and the emerging new players

Kerala give birth to many Cricket talents too. It starts from Sreesanth, Tinu Yohannan and is continuing with Sanju Samson, Sreyas Iyer and more. Team Kerala emerged as giant killers in Renji Trophy and has become a considerable stronghold team in the championship. Kerala Cricket association had done remarkable base root activities during the last decade and it ends up with good results. The good infrastructure, Tournaments, Coaching camps and coaches clinics has created good outcome.

4.2.17. Coaches Paradise

For her incomparable great performance and achievements, PT Usha is committed to her coach OM Nambiar. KP Thomas, former trainer of Koruthodu CKMHS had picked a series of athletes and they all made a mark in the national and international meets. CK Chathunni, the Football coach of Kerala Police was a real dronacharya. Olympian O Abdurahman was the Premier Tyres coach. TA Jaffar a talented footballer turned Coach trained Kerala to win the Santhosh Trophy. Sunny Joseph and Gopinath were great Indian volleyball coaches. TP Ouseph was a blessed Jumping coach. Kerala cannot forget Raju Paul of St. George School, Shibi Teacher of Mar Basil, Tomy Joseph of Pullorampara and Manoj Erimayoor of Parali School and their significant contributions towards School sports.

Coaches have an important role in developing talents and Kerala has always produced such great masters.

4.2.18. Kerala's own Sevens

Sevens Soccer originated in Kerala. It is still the most popular local sports attracting thousands of spectators everywhere. To an extent 7s killed the popularity of 11s. More than 50 Sevens tournaments are being conducted in Kerala with almost full packed galleries. The required ground for 7s is small, number of players in one team is 7 and the duration of the play is 1 hr. It can be compared with the 20-20 of Cricket which revolutionise Cricket.

4.2.19. The beaches, mines

The seashore of the state produces many talents from Athletics to Football. PT Usha is from the sea side of Kozhikode. The beach side of Thiruvananthapuram, Kollam and Malappuram was a mine of Football players.

4.2.20. Boat Races

Boat races are among the grandest traditions still alive and thriving in Kerala. People go to these events in large numbers to watch these snake shaped beauties going head to head in rhythm to the old boat songs sung in full volume. It's an idigenous sporting event as well as a cultural extravaganza and a beautiful Tourism product. The boat league started recently attracted big audience through Television too.

4.2.21. Swimming traditions

There is a strong tradition for Swimming in particular and water sports in general. Two Kerala Swimmers, Wilson Cheriyan and Sebastian Xavier were internationally acclaimed swimmers and have broken many records nationally. Sajan Prakash continue the legacy.

4.2.22. Many Championships, Roaring Galleries

Kerala host many Championships in Football, Volleyball, Basketball and in Cricket regularly. All those were conducted in crowded galleries. Nehru Trophy, Sree Narayana Trophy, Nagjy Cup, Mammen Mappila Trophy, Tripayar Volley, Federation Cups were a few among them. All these kept Kerala, a happening place for Sports events.

4.2.23. Sports Nurseries

Many organisations and institutions dedicated to setup and maintaining facilities for coaching centres/

academies for the budding talents. SEPT is a remarkable name as they are managing 80+ Football academies in the state directly or in Franchisee model. Many religious and other institutions manage such facilities for Kids and youth. PT Usha is running an athletics school at her native. Former players successfully run such training centers. Kerala is rich with the availability of coaching facilities for multiple sports in different standards.

4.2.24. Areekkod, the Soccer village

This village town of Malappuram is well known for its Football frenzy. For them Football is a homely affair. Everyone in the village knows to play Football and do swimming. It's quite natural as the village is surrounded with a river and there are enough small grounds to play. Many football players have risen from the village like any other malabar villages. There is a culture nurtured in the villages surrounded with Football.

4.2.25. Chandanakkampara, the village of Basketball

This small village in Kannur and the School there has helped hundreds of people to get jobs in Indian Military Services or in Indian Railway through Basketball. This sports changed their lives. It verbally benefitted for them to build their life.

4.2.26. Maharajas

Maharajas stadium is an emotional connect for all Keralites who love Football. On this lucky ground, Kerala won Santhosh Trophy two times. Record number of spectators were there to watch the matches in temporary galleries both time.

4.2.27. Nehru Stadium and One Lakh Spectators

It was an exhibition match. But one lakh Football lovers came to watch India- Iraq football match conducted just after the inauguration of Jawaharlal Nehru International Stadium in Kochi. It's an all time record.

4.2.28. Sports Turfs and Arenas

The beautiful synthetic turf and covered small stadiums is a new trend which is spreading like a wave in Kerala. It was not only in big towns but also in small towns and the trend still continues. There are all chances to grow further. Some of them are small sports complexes with facilities for multiple sports.

4.2.29. Sports Retail Hub

Kerala is basically a consumer market. There is no change for it whether it is Sports goods, Sports lifestyle products or Apparel. The biggest sports retail chain- Decathlon considered Kerala as their one of the lucrative markets in Asia. Many local entrepreneurs started investing in Sports retail.

4.2.30. Gokulam, A new hope for Corporate in Sports

Gokulam FC created an impact in the corporate world and inspired many. They became the National League champions in both men and women categories in a very fast pace. They got good media attention. The visibility and acceptance of the brand has increased. The efforts really benefited the Group in many ways.

4.2.31. Prime Volley League

The newly launched Prime Volleyball league has become a Kerala derby. 2 teams are from Kerala. One third of the total players in league are from here. It's almost similar status in the statistics of Coaches and officials.

4.2.32. IPL

More players from Kerala started playing in IPL. Its a real boost for Kerala Cricket. Its an outcome of the focused mission and activities of Kerala Cricket Association.

4.2.33. Sanju Samson

The Rajasthan Royals retained Sanju Samson as captain with an offer of 14 Crore and which is the top

remunerations of the league in this season. His estimated net worth is 67 Cr. Also Sanju came back to India 20-20 team. All the achievements- wealth, fame and all he gained from Cricket.

4.2.34. Champions again

Kerala defeated Railways and won the women's title in the National senior volleyball championships recently. It was Kerala's fourth straight triumph in the Nationals. The Kerala players mainly came from the KSEB and Kerala Police

4.2. The Uniqueness

The most Sports enthusiastic community

The people of Kerala are generally sports enthusiasts and they were interested to watch matches directly in the galleries. Now in the age of TV and New Media the Keralites have started consuming the media especially the Sports Media in huge size. Even now if the matches are conducted in the nearby stadiums people still come, watch and the galleries are full. The filled galleries is a common phenomenon for the national matches conducted in Kerala.

Some interesting studies are there with respect to the TV viewership of Keralites in the European Leagues, Club Football, Euro Cup, Copa America and Fifa world cup. It can be compared with the countries like Brazil, Germany, France or Italy which stand in the top in the area of football. For Keralites Fifa World cup is a season like their national festival, Onam. Truly the Football season is linked with trade and commerce. Big offers are there for TV, Smart TV and Mobile phones. The companies have special campaigns with specific ad creatives focusing on World cup even in regional languages.

Increasing demand for Cable TV and Dish TV connectivity and even for Internet. Big screens will be placed in public space for the better feel. Thousands of such screens will rise in nook and corner of the state. Banners and Flex boards supporting their favourite teams can be seen anywhere. As Qatar is hosting the biggest sporting event next year a large number of Keralites are getting ready to move to the middle eastern country where they can watch the matches directly.

Major telecasters around the world have started providing major championships with the background commentary in Malayalam.

4.3.1. Strong media penetration- Print, TV and Digital

With the high levels of literacy, education and interest in social happenings the media consumption of Keralites is very high. The regional language newspapers and magazines are on the top in Circulation and readership. The English language newspapers and periodicals are also getting greater acceptance all over the state. The television content consumption in both regional and English language is also very high on a comparison with that of the other states. Kerala is always a media savvy community as a result of its human development background.

4.3.2. High priority for Sports in any mode of media.

The Kerala media is giving high priority to Sport. The print media dedicate regular pages, special supplements for events, guest columns and articles, front page coverage for important events and even editorials. The major sports channels are providing regional language telecast for leagues and important national & international events.

4.3.3. Geographical Advantages

Kerala has a Coastline of 589.5 kilometers, which comes 10% of India's total coastline. It's known for its palm-lined beaches and backwaters, a network of canals. Inland include the Western Ghats, mountains whose

slopes support tea, coffee and spice plantations as well as wildlife.

The beach sides are always full with different types of sports from Football to Volleyball in the morning and in the evening. Playing in sand is somewhat difficult and it help the players to acquire new skill sets. By taking these advantages, lot of players who played their childhood and teenage in the tough grounds have reached to peak performances and got placed in various premium institutions. The coastal belt of TVM and Kollam contributed many players in Football. Some of them have played for India in international matches.

The hilly areas have also contributed a series of players in Athletics and in Volleyball. The geography of the hilly areas is naturally supportive to Sprint and Jump items. Kerala backwaters and rivers created Swimmers of International standards.

With high population density, the state is like a big metro and there is a lack of big grounds for Professional Football/ Cricket in both Urban & Rural areas. It leads to the development of indoor courts in various places and it has contributed exceptional talents in Indoor items like Badminton, Tennis, Squash.

4.3.4. The USP's of Kerala Sports

1. Potential to replicate the Kerala Model
Similar to sectors such as Education, Healthcare, Tourism, Manpower
2. Sports having a deep rooted culture and being part of life
3. Presence of big talent pool
4. Feeder state status
5. Emerging aspiration of Kids and parents
6. Long heritage and great achievements
7. No rural, urban division
8. Large television and digital viewership
9. Strong consumerism
10. Emerging entrepreneurial interests
11. Possibilities of partnerships: corporate, public sector, co-operative
12. Indigenous sport items such as Boat-race, Tug of war, Sevens football
13. Better sports infrastructure
14. Concerns over health, fitness
15. Sports and Fitness Literacy

Define an Economy and deciding the boundaries are every important for developing a framework for a sector specific Economy.

The basic Economy definition has to analyse in the Sports Sector point of view to define it. The Economics has evolved as a Science and matured during the time. It has changed a lot. New concepts has emerge. It all to be considered while approach the Sports sector to transform as an Economy.

5.1. The Economy- Backdrop

The Economy is being defined in the backdrop of transforming the sector of Sports into an exclusive economic sector and then seeking the scope to consider different activities in the sector as economic activities; where all products or services are needed to be converted into economic terms. The outcome from the jobs created directly or indirectly through various activities of Sports are to be converted to monetary values. In the modern age the concepts are changing due to the technological innovations and the emergence of new ideas in capital, assets, resources, outcome etc. The classic definitions are not fully applicable in such situations. Even the non economic outcomes are also to be considered and impact should be assessed. New indexes may have to be developed to measure such outcome and it has to be incorporated with the economic parameters. Still the relevance of Sizing, Quantification, Measure etc is existing which are considered as the pillars of Economic assessments.

5.2. The Classic Definition and Explanation

An economy is the large set of interrelated production, consumption, and exchange activities that aid in determining how scarce resources are allocated. The production, consumption, and distribution of goods and services are used to fulfill the needs of those living and operating within the economy, which is also referred to as an economic system.

In general, it is defined as a social domain that emphasize the practices, discourses, and material expressions associated with the production, use, and management of scarce resources. A given economy is a set of processes that involves its culture, values, education, technological evolution, history, social organization, political structure and legal systems as well as its geography, natural resource endowment, and ecology, as main factors. These factors give context, content, and set the conditions and parameters in which an economy functions. In other words, the economic domain is a social domain of interrelated human practices and transactions that does not stand alone.

Economic agents can be individuals, businesses, organizations, or governments. Economic transactions occur when two groups or parties agree to the value or price of the transacted good or service, commonly expressed in a certain currency. However, monetary transactions only account for a small part of the economic domain.

5.3. New Approach

Economic activity is spurred by production which uses natural resources, labor and capital. It has changed over time due to technology, innovation (new products, services, processes, expanding markets, diversification of markets, niche markets, increases revenue functions) such as, that which produces

intellectual property and changes in industrial relations.

5.4. Types of Economy and the evolution of New Economy

A market-based economy is one where goods and services are produced and exchanged according to demand and supply between participants (economic agents) by barter or a medium of exchange with a credit or debit value accepted within the network, such as a unit of currency. A command-based economy is one where political agents directly control what is produced and how it is sold and distributed. A green economy is low-carbon, resource efficient and socially inclusive. In a green economy, growth in income and employment is driven by public and private investments that reduce carbon emissions and pollution, enhance energy and resource efficiency, and prevent the loss of biodiversity and ecosystem services. A gig economy is one in which short-term jobs are assigned or chosen via online platforms. New economy is a term that referred to the whole emerging ecosystem where new standards and practices were introduced, usually as a result of technological innovations. The global economy refers to humanity's economic system or systems overall.

Today the range of fields of study examining the economy revolves around the social science of economics, but may include sociology (economic sociology), history (economic history), anthropology (economic anthropology), and geography (economic geography). Practical fields directly related to the human activities involving production, distribution, exchange, and consumption of goods and services as a whole are engineering, management, business administration, applied science, and finance.

All professions, occupations, economic agents or economic activities contribute to the economy. Consumption, saving, and investment are variable components in the economy that determine macroeconomic equilibrium. There are three main sectors of economic activity: primary, secondary, and tertiary.

Due to the growing importance of the financial sector in modern times, the term *real economy* is used by analysts as well as politicians to denote the part of the economy that is concerned with the actual production of goods and services, as ostensibly contrasted with the *paper economy*, or the financial side of the economy, which is concerned with buying and selling on the financial markets.

KEY TAKEAWAYS

- An economy is the large set of interrelated production and consumption activities that aid in determining how scarce resources are allocated.
- In an economy, the production and consumption of goods and services are used to fulfill the needs of those living and operating within it.
- Market-based economies tend to allow goods to flow freely through the market, according to supply and demand.

6.1. Human Development Index (HDI)

The HDI was created to emphasize that people and their capabilities should be the ultimate criteria for assessing the development of a country, not economic growth alone. The HDI can also be used to question national policy choices, asking how two countries with the same level of GNI per capita can end up with different human development outcomes. These contrasts can stimulate debate about government policy priorities.

The Human Development Index (HDI) is a summary measure of average achievement in key dimensions of human development: a long and healthy life, being knowledgeable and have a decent standard of living. The HDI is the geometric mean of normalized indices for each of the three dimensions.

The health dimension is assessed by life expectancy at birth, the education dimension is measured by mean of years of schooling for adults aged 25 years and more and expected years of schooling for children of school entering age. The standard of living dimension is measured by gross national income per capita. The HDI uses the logarithm of income, to reflect the diminishing importance of income with increasing GNI. The scores for the three HDI dimension indices are then aggregated into a composite index using geometric mean. The HDI simplifies and captures only part of what human development entails. It does not reflect on inequalities, poverty, human security, empowerment, etc. A fuller picture of a country's level of human development requires analysis of other indicators and information presented in the statistical annex of the report.

6.2. Happiness Index of UN

The *World Happiness Report* is a publication of the United Nations Sustainable Development Solutions Network. It contains articles and rankings of national happiness, based on respondent ratings of their own lives, which the report also correlates with various (quality of) life factors. As of March 2021, Finland had been ranked the happiest country in the world four times in a row. In July 2011, the UN General Assembly adopted resolution 65/309 *Happiness: Towards a Holistic Definition of Development* inviting member countries to measure the happiness of their people and to use the data to help guide public policy. On April 2, 2012, this was followed by the first UN High Level Meeting called *Wellbeing and Happiness: Defining a New Economic Paradigm*, which was chaired by UN Secretary General Ban Ki-moon and Prime Minister Jigmi Thinley of Bhutan, a nation that adopted gross national happiness instead of gross domestic product as their main development indicator.

The first World Happiness Report was released on April 1, 2012 as a foundational text for the UN *High Level Meeting: Well-being and Happiness: Defining a New Economic Paradigm*, drawing international attention. The first report outlined the state of world happiness, causes of happiness and misery, and policy implications highlighted by case studies. In 2013, the second World Happiness Report was issued, and in 2015 the third. Since 2016, it has been issued on an annual basis on the 20th of March, to coincide with the UN's International Day of Happiness. The rankings of national happiness are based on a Cantril ladder survey. Nationally representative samples of respondents are asked to think of a ladder, with the best possible life for them being a 10, and the worst possible life being a 0. They are then asked to rate their own current lives on that 0 to 10 scale. The report correlates the life evaluation results with various life factors.

The life factor variables used in the reports are reflective of determinants that explain national-level differences in life evaluations across research literature. However, certain variables, such as unemployment or inequality, are not considered as comparable data is not yet available across all countries. The variables used illustrate important correlations rather than causal estimates.

The use of subjective measurements of wellbeing is meant to be a bottom-up approach which emancipates respondents to evaluate their own wellbeing. In this context, the value of the Cantril Ladder is the fact that a respondent can self-anchor themselves based on their perspective.

6.3. Health Index of India by Niti Ayog

The NITI Aayog, in collaboration with the Union Ministry of Health and Family Welfare and the World Bank, began tracking the health index across states in 2017 with an aim to “measure and compare the overall performance and incremental performance across states and UTs over time and nudging the states and UTs to shift the focus from inputs and outputs to outcomes. The health index is essentially a composite score of 24 indicators under three domains — health outcomes, governance and information; and key inputs and processes.

For the fourth such report (2019-2020), three new indicators were added for large states.

These are mortality ratio, proportion of pregnant women who received four or more antenatal care checkups, and level of registration of deaths. The current report does not take into account the impact of COVID-19.

6.4. Gross Domestic Product (GDP)

Gross domestic product (GDP) is the total monetary or market value of all the finished goods and services produced within a country’s borders in a specific time period. As a broad measure of overall domestic production, it functions as a comprehensive scorecard of a given country’s economic health. Though GDP is typically calculated on an annual basis, it is sometimes calculated on a quarterly basis as well. In the U.S., for example, the government releases an annualized GDP estimate for each fiscal quarter and also for the calendar year. The individual data sets included in this report are given in real terms, so the data is adjusted for price changes and is, therefore, net of inflation.

KEY TAKEAWAYS

- Gross domestic product (GDP) is the monetary value of all finished goods and services made within a country during a specific period.
- GDP provides an economic snapshot of a country, used to estimate the size of an economy and growth rate.
- GDP can be calculated in three ways, using expenditures, production, or incomes. It can be adjusted for inflation and population to provide deeper insights.
- Though it has limitations, GDP is a key tool to guide policy-makers, investors, and businesses in strategic decision-making.

6.4.1. How Is the GDP of India Calculated?

Gross domestic product (GDP) is the single standard indicator used across the globe to indicate the health of a nation's economy: one single number that represents the monetary value of all the finished goods and services produced within a country's borders in a specific period. Gross domestic product may be easy to define but it is complex to calculate, and different countries employ different methods.

KEY TAKEAWAYS

- India's Central Statistic Office calculates the nation's gross domestic product (GDP).

- India's GDP is calculated with two different methods, one based on economic activity (at factor cost), and the second on expenditure (at market prices).
- The factor cost method assesses the performance of eight different industries.
- The expenditure-based method indicates how different areas of the economy are performing, such as trade, investments, and personal consumption.

6.4.2. India's Data Collection Process

The Central Statistics Office under the Ministry of Statistics and Program Implementation is responsible for macroeconomic data gathering and statistical record keeping. Its processes involve conducting an annual survey of industries and compilation of various indexes such as the Industrial Production Index (IPI) and the Consumer Price Index (CPI).

The Central Statistics Office coordinates with various federal and state government agencies and departments to collect and compile the data required to calculate the GDP and other statistics. For example, data points specific to manufacturing, crop yields, or commodities—which are used for the Wholesale Price Index (WPI) and CPI calculations—are gathered and calibrated by the Price Monitoring Cell in the Department of Consumer Affairs under the Ministry of Consumer Affairs.

Similarly, production-related data used for calculating IPI is sourced from the Industrial Statistics Unit of the Department of Industrial Policy and Promotion under the Ministry of Commerce and Industry. All the required data points are collected and aggregated at the Central Statistics Office and used to arrive at GDP numbers.

6.4.3. India's GDP Calculation Process

The GDP in India is calculated using two different methods, leading to different figures that are nonetheless close in range.

The first method is based on economic activity (at factor cost), and the second is based on expenditure (at market prices). Further calculations are made to arrive at nominal GDP (using the current market price) and real GDP (inflation-adjusted). Among the four released numbers, the GDP at factor cost is the most commonly followed figure and reported in the media.

6.4.3.1. The Factor Cost Figure

The factor cost figure is calculated by collecting data for the net change in value for each sector during a particular time period. The following eight industry sectors are considered in this cost:

1. Agriculture, forestry, and fishing
2. Mining and quarrying
3. Manufacturing
4. Electricity, gas, water supply, and other utility services
5. Construction
6. Trade, hotels, transport, communication, and broadcasting
7. Financial, real estate, and professional services
8. Public administration, defense, and other services

6.4.3.2. The Expenditure Figure

The expenditure (at market prices) method involves summing the domestic expenditure on final goods and services across various streams during a particular time period. It includes consideration of expenses towards household consumption, net investments (i.e., capital formation), government costs, and net trade (exports

minus imports). The GDP numbers from the two methods may not match precisely, but they are close. The expenditure approach offers good insight into which parts contribute most to the Indian economy. For example, domestic household consumption, which forms 59.05% of the economy, is the reason why India remains unaffected to a good extent by economic slowdowns in other parts of the world. Any economy with a high concentration on exports will be more susceptible to the effects of global recessions.

6.4.4. Timelines for India's GDP

Each quarter's data are released with a lag of two months from the last working day of the quarter. Annual GDP data is released on May 31, with a lag of two months. (The financial year in India follows an April-to-March schedule.) The first figures released are quarterly estimates. As more and more accurate data sets become available, the calculated figures are revised to final numbers.

6.4.5. Major Contributors of Indian GDP

The largest contributor to India's GDP is the services sector, which accounted for 49.3% of GDP in 2020. The next largest contributor was the industrial sector (23.2%) and then the agriculture sector (18.3%).

6.5. Kerala- Major Contributors of GSP

The state's service sector which accounts for around 65% of its revenue is mainly based upon its Hospitality industry, Tourism, Ayurveda & Medical Services, Pilgrimage, Information technology, Transportation, Financial sector, and Education. Major initiatives under the industrial sector include Cochin Shipyard, Oil refinery, Shipbuilding, Software Industry, Coastal mineral industries, food processing, marine products processing, and Rubber based products. The primary sector of the state is mainly based upon Cash crops. Kerala produces a significant amount of national output of the cash crops such as Coconut, Tea, Coffee, pepper, Natural rubber, Cardamom, and Cashew in India. The cultivation of food crops began to reduce since 1950's. The Migrant labourers in Kerala are a significant workforce in its industrial and agricultural sectors. Being home to only 1.18% of the total land area of India and 2.75% of its population, Kerala contributes more than 4% to the Gross Domestic Product of India. Tourism contributes to nearly 10% of the state's GDP. Around 18% of the total employees in the organised sector of state, both public and private, are employed in the Educational sector. Agricultural sector contributes only 7% to the GSDP of Kerala. Kerala produces 97% of national output of pepper, and accounts for 85% of the area under natural rubber in the country. Coconut, tea, coffee, cashew, and spices including cardamom, vanilla, cinnamon, and nutmeg comprise a critical agricultural sector. Around 90% of the total Cardamom produced in India is from Kerala. India is the second-largest producer of Cardamom in world.

The primary sector contribution is 12.07% and the Secondary sector contribution comes to 24.27% towards Kerala GSP.

6.5.1. Primary Sector

Share of Primary sector (Agriculture, Allied Activities, fisheries and logging) is declining, Net cropped area has decreased from 2078700 ha in 2014–15 to 1973000 ha. Cropping pattern is dominated by Paddy in wetlands and cash crops like Coconut, Rubber Tea, Coffee, Cardamom, Pepper and Cashew in garden lands, Other crops are Tapioca, Banana, Vegetables, mango, jack etc. Kerala produces 97% of the national output of black pepper and accounts for 85% of the natural rubber in the country. Coconut, tea, coffee, cashew, and spices – including cardamom, vanilla, cinnamon, and nutmeg are the main agricultural products. 80% of India's export quality cashew kernels are prepared in Kollam. Allied activities (Dairying and Fisheries) is an important sub sector.

6.5.2. Secondary Sector

Share of secondary sector (manufacturing) in Gross State Domestic Product (GSDP) is 24.27%. The state has strong presence of Public sector and Private sector units. The industries based in Kerala comprises mainly of Medium, Small & Micro sector. Since large industries are few, ancillary units are also few. The major manufacturing units are related to Food processing (especially Cashew, pickles and curry powders, fruits processing, Rice processing), Marine products processing, Ayurvedic Medicines manufacturing, Coir, Rubber based products, Wood & bamboo based Industries, Ship Breaking, Handicrafts etc.

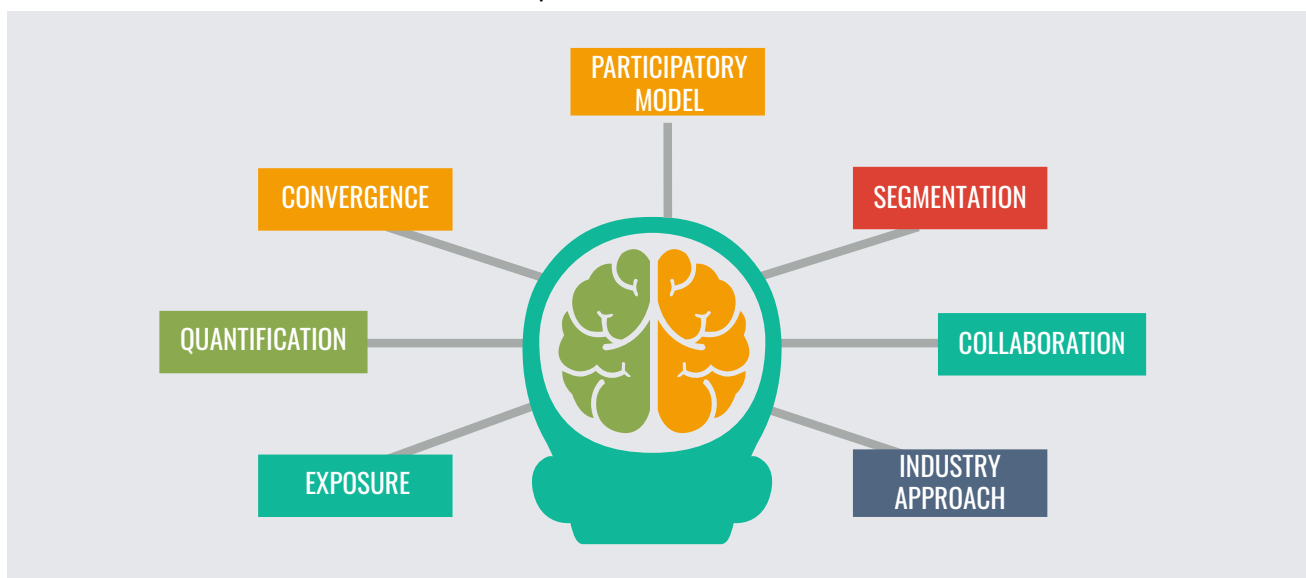
Under Ores & Minerals, we have industries related to the processing of Monazite, Ilmenite, Granite & Lime Based products. Under electronic industry, software industry is growing. Major industries in the Public Sector include Cochin Shipyard, Cochin refinery, FACT, Kerala Minerals & Metals, Malabar Cements etc.

6.5.3. Tertiary Sector

Services sector is the prime mover of Kerala Economy (63.66 % of GSDP). Hospitality, Tourism (Inland & International) Ayurveda & medical services, Pilgrimage, IT based exports, Transport Sector, Financial Services, Education are the main areas of service sector.

- The Sports Economy Mission is an aspirational project to build up a sector specific Economy. When the process completed the Sports will become a contributing sector to GDP and Economy. It will emerge as an another model of Kerala Development such as Education, Healthcare and Tourism. A detailed overview of the Kerala Model Development has been made and evaluated its merits and demerits.
- In the initial chapters (1 to 6) we have made an effort to define the Sector in the Economic point of view. The Economic theories, definitions, explanations etc were closely reviewed. The new developments has been assessed. The indexes were considered. The Economic and Non Economic outcome were discussed in the perspective of Health and other factors. A broader definition for the Sector was fixed. Sports, Fitness, Wellness and Physical Exercises were included in the spectrum.
- It is also captured the historical takeaways of Kerala Sports. It has given a strong foundation for moulding the Sports Economy framework.
- On the basis of the definition the segments and micro segments were identified and fixed. A thorough analysis has been done on each segments and in micro segments. Each sector has been defined and explained.
- The revenue streams were identified and fixed as per. The available secondary data was consolidated and the sizing of each category was done. A detailed Survey and Geographical mapping is suggested with the components to be included.
- The strategy and the approach has plotted as an outcome of all these elements.
- The projects, programmes and schemes are identified on the basis of a requirement analysis. These projects are suggested in each segments and in general. The basic cost estimation has also made and the source of input is suggested along.
- These programmes required Govt. investments on a bare minimum level. It will be compensated with the participatory approach. More stakeholders and minute segmentation will be the key of the strategy. It is followed in the entire studies and analysis.
- The objective of the Sports Economy Mission is to increase the percentage of contribution of Sports sector from merely 1% to 3-4%. The strategies, approach and programmes basically focused to achieve the target. This mission also aims to quantify the non economic outcome such as its impact on health with the available indexes or newly created ones.

Seven core elements of the strategy have been suggested. All these lead to growth, based on Economic parameters. Main objective of this approach is to change the current perspective of planning where the entire planning is basically centralised and the Govt is acting as a provider of funds. This is a shift from that approach which is proposed in the participatory model. More stakeholders will come. They will share the responsibilities and contribute for the development process. Another major shift is in widening the Canvas. The Convergence, Collaboration and segmentation are proposed with this objective. The better exposure will change the perspectives. The quantification of each micro elements and process will lead to an industry orientation and this approach is the pillar of an economic framework for the Sports sector.



1. Participatory Model

Impact- Participatory Method with more stakeholders

The Canvas is widening. When more people and organisations get stake, it will naturally improve the growth prospects. The participatory model can be operated case to case and project to project. It is impossible to chalk out some hard and fast rule. As a policy guideline it can be followed. On each and every Project, Programme and Schemes this approach shall be adopted. In the below mentioned list some of the stakeholders may have no role at present. Cooperative is an example. It is a large segment in Kerala and have enough potential. But that potential is not tapped so far. The corporate involvement is also comparatively low. Some segments have little involvement. It has to be improved further. When more organisations/ institutions come together the project will be more powerful.

The below plotted list comprises with the potential stakeholders from different segments of Sports sector and other sectors with a potential to blend with.

<i>The Ministry of Youth Affairs and Sports, Government of India</i>		<i>Sports Authority of India</i>
<i>Department of Sports and Youth Affairs, Govt. of Kerala</i>		<i>Kerala Sports Council</i>
<i>Indian Olympics Association</i>		<i>Sports Kerala Foundation</i>
<i>The International Olympic Committee</i>	<i>FIFA</i>	<i>International Sports Associations</i>
<i>Indian Sports Associations</i>	<i>BCCI</i>	<i>Kerala Sports Associations</i>
<i>Private Sector Companies</i>	<i>Corporate</i>	<i>Sports Companies</i>
<i>Public Sector Undertakings</i>	<i>Co-operatives</i>	<i>Local Bodies</i>
<i>NRIs</i>	<i>SMEs</i>	<i>Colleges and Schools</i>
<i>Alumnas of Organisations and Institutions</i>	<i>Institutions</i>	<i>Organisations</i>
<i>Social Organisations</i>	<i>NGOs</i>	<i>Startups</i>
<i>Professional Clubs</i>	<i>Academies</i>	<i>Management Institutions</i>
<i>Local Communities</i>	<i>Religious Organisations</i>	<i>Players</i>
<i>Political parties and their allied organisations</i>	<i>Coaches</i>	<i>Organisers</i>
<i>Former Players</i>	<i>Local Clubs</i>	<i>Community Institutions</i>
<i>Industry & Management Organisations</i>	<i>Startup Mission</i>	<i>Media- TV, Print & Digital</i>
<i>Management & Technology Institutions</i>	<i>Fans & Fan Clubs</i>	<i>Spectators</i>
<i>Sports Lovers</i>		

The Concept

There are many potential stakeholders in Sports in which only a few are participating in full swing. Corporate, Cooperative, PSU and Government Departmental participation are comparatively low. NGOs, SMEs, Startups, Religious organisations and Collectives are active in the state but have very small stake in Sports. The state is not effectively utilising the projects, programmes and schemes of International and national bodies for the development of sports and physical activities. Lot of management institutions, research organisations and industrial bodies are actively doing various social and entrepreneurial interventions. Major sectors are utilising the inputs of these bodies. Kerala has the immense potential to use the NRI resources from investments to exposure and collaborations to tie ups. For the returnees its an attractive investment proposition.

Case to case approach

The participation should have to promote as a core concept. The approach may vary from case to case. The formats of the participation and its alignments can be decided only after a detailed evaluation of the assignment or a particular tasks. Corporate can invest for professional clubs while cooperative can make it for coaching facilities. NRIs can do it for medium sporting facilities. The Industry organisations can facilitate the drive. Management institutions can contribute on developing the canvas.

The Objectives

The spent of the Govt could be moderated or reduced the by the active participation of the private sector, public sector, cooperative and many more stakeholders. Private investment is essential in such scenario. There are many corporates originated in Kerala or operate from here which have the capability of doing investments in sports which is beneficial for both the state and the companies. They can invest in developing professional clubs, coaching centers or academies, infrastructure like stadiums or sports complexes and event properties like leagues or championships. Such investments in the past were small in number and in volume. No serious efforts were made to attract the corporate world to sports. Only a few companies were engaged in the domain. The number is very less if we take companies with Sports as the core activities. It's limited with retailers, event managers, small manufacturers and can be counted by finger.

Sports Arenas/ Sporting Turfs- A great entrepreneurial intervention in the Sports ecosystem

It was a real revolution that happened in entire state in the Sports sector that plenty of sporting turfs were developed in the nook and corner of the state irrespective of whether cities or villages. It has successfully developed its own business model and revenue propositions. Still the trend continues with more such arenas are coming and the segment is expanding. All arenas in the state are owned by the private entrepreneurs. It can be considered as the most effective intervention in terms of private investments that happened in Kerala.

Not just investments

It not only reduces the spent of the Government; various resources and capabilities are being developed along with it. Effective participation has the capacity to change the current scenario completely and to lead to new horizons.

Priorities

Attracting investments is the priority. That definitely gives a momentum to the economy. It's essential to present an attractive canvas with solid projects and programmes supported with financial models and proper projections before the investors, whether they are corporates within the state or from other states. The same is applicable for any stakeholder such as Cooperatives, PSUs, NRIs, SMEs, Startups, NGOs, Trusts, Religious Institutions, Collectives or whoever it may be. Creating productive and profitable investments and ventures shall be the top priority in building a sector specific economy. The Govt share shall be kept to a maximum of 25% as a whole.

Programmes

Continuous investment meets - General, Clustered or One to one and thorough follow ups can ensure success in the mission with the participation of stakeholders through investments and ventures. There are multiple options for it and it's so essential to keep an equilibrium for a sustainable ecosystem. It must be managed on the demand/ requirement basis.

2. Convergence

It is essential to link various segments or departments with Sports for its rapid and sustainable growth. It will widen the scope for sure. Wellness is an example for it. Now it's a branch of health and not standing independently. It is more related with Sports and Physical activities. Globally Wellness industry is booming. More products and services are added under the segment day by day.

Health and sports are interconnected in various levels. Investment in Sports and Physical Activities will help to cut short the Healthcare budget. It is a great tool of prevention. Indigenous sporting events have excellent Tourism potential. Boat Race, Sevens Soccer and Tug of War are few examples. Ayurveda will support in Sports through Sports medicine and Wellness solutions.

Sporting activities will increase Employability and help individuals in developing Skills. It will be boosting Trade and retailing. Technology, Science and Engineering can be contributed to Sports in the modern era. Media especially Social Media has a key role in Sports development. Sports generate major chunk of revenue worldwide from Television.

Sports should have a revolutionary role in Education. It is necessary that sports shall be a part of the Curriculum. Yoga is not just a physical and mental exercise procedure now and it has become a sporting event too. The innovators and Startups can do a lot with Sports.

Few areas are mentioned below which have direct impact when sports is converged with these areas.

Impact-Blending sports with other potential areas is essential for further growth in the segment

<i>Health</i>	<i>Culture</i>	<i>Tourism</i>	<i>Ayurveda</i>	<i>Yoga</i>
<i>Lifestyle</i>	<i>Mental Health</i>	<i>Employability</i>	<i>Skill Development</i>	<i>Wellness</i>
<i>Happiness Index</i>	<i>Agriculture- Rubber etc</i>	<i>Trade- Retailing</i>	<i>Event Management</i>	<i>Marketing</i>
<i>Construction</i>	<i>Manufacturing</i>	<i>Startup Mission</i>	<i>Technology, Science and Engineering</i>	
<i>Media including digital media</i>				

3. Segmentation

Only a few segments are fully engaged in or fully covered for sporting activities. While some segments are partially addressed, few of them are not even addressed. Even Professional Sports and School - College Sports are not fully operational with events and activities. The Home Sports segment is absolutely new. The Kids Sports segment is slowly emerging. Women and Elders to be engaged more in Sports. That segment shall be addressed with specific schemes and projects. Institutional sports is getting a momentum with the developments in this regard in corporate sector.

When we address Sports and Fitness in more segments the possibility of growth will be high. All the segments will add direct and indirect benefits for Individuals, State and Economy. It will help to develop the concept of an all inclusive sports. It will ensure participation of all and will be beneficial to all in one way or another.

Impact- Better segmentation leads to all inclusion. It will develop the concept of 'Sports for All'.

<i>Professional Sports</i>	<i>Ametuer Sports</i>	<i>School, College Sports</i>
<i>Recreational Sports</i>	<i>Institutional Sports</i>	<i>Community Sports</i>
<i>Home Fitness</i>	<i>Home Sports</i>	<i>Kids Sports</i>
<i>Veteran Sports</i>	<i>Sports for Women</i>	<i>Sports for differently abled</i>

4. Quantification

The Quantification will be an essential part of the Sports Economy moulding process. When there is a measure/ count, it can be converted to economic and monetary terms easily. Eventually Sports will become a part of GDP by contributing through various products and services evolved from different segments. All these are considered as economic activities with direct or indirect impact and contribution. Some may have no direct contribution but may have influence on Economy. If the number of players increases they will involve in sporting activities and will start getting income. When they will be affiliated to various clubs they will get more remuneration. When they get any permanent job it will be a lifelong settlement for them. Truly it contributes to the economy. We have to count the number of employments generated and recruitments in clubs every year. The proper quantification process helps to decide targets and chalk out good plans.

Impact- It will shift the activities into result oriented mode. We can fix certain targets and goals to achieve. It can be measurable. We can plan for year to year investments and the returns.

Essentials- Proper Primary data, Detailed survey, Geographical mapping.

<i>Stadiums and their classifications</i>	<i>Turfs & Arenas</i>	<i>Sports Complexes</i>
<i>Walkways</i>	<i>Cycle tracks</i>	<i>Professional Clubs</i>
<i>Ametuer Clubs</i>	<i>Events</i>	<i>Leagues</i>
<i>Academies</i>	<i>Recruitments</i>	<i>Employment</i>
<i>Players</i>	<i>Players- Rating</i>	<i>Coaches</i>
<i>Coaches- Certification levels</i>	<i>Equipment sales</i>	<i>Media Consumption</i>
<i>Advertisements & Sponsorships</i>	<i>Govt. Grants & Contributions</i>	<i>Equipment manufacturing, Export</i>

5. Collaborations

Collaborations is the new path of growth and it widens the spectrum. In various areas of Sports development tie ups and collaborations with Consulting Companies, Engineering Institutions, Research Centers, Management Experts & Organisations, Technology entities etc. will enhance the same. It can be worked out on case to case basis and in accordance with the nature and the character of the project. In this new era it's impossible to keep segments stand alone. It will limit the possibilities of growth and development. If association plans for leagues, the role of Consulting Companies, Management Organisations, Event management experts, Broadcasters, Streaming experts, Branding specialists, Marketing vizards, Financial Analysts, Market research centers etc is important. With the inputs and contributions of all these stakeholders, the league can be developed in the standards of IPL, ISL etc. If we properly crack the secret mantras of IPL, ISL, Pro Kabaddi League etc it is definitely possible to explore the full potential of the newly developing leagues. On the same way Developing Clubs, Academies etc need such collaborations for excellent output.

We want better collaborations to enlighten the Sporting arena. The collaborations shall be in need basis only.

<i>Management Organisations</i>	<i>Management Experts</i>	<i>Management Institutions</i>
<i>Financial Professionals</i>	<i>Financial Organisations</i>	<i>Consulting Companies</i>
<i>Engineering Organisations</i>	<i>Engineering Institutions</i>	<i>Training Firms</i>
<i>Trainers</i>	<i>Psychologists</i>	<i>Visual Analysts</i>
<i>Sports Analyst</i>	<i>Data Scientists</i>	<i>AI Experts</i>
<i>Nutrition Companies</i>	<i>Technology Companies</i>	<i>Technology Startups</i>
<i>Film Makers</i>	<i>Marketing Specialist</i>	<i>Sports Management Firms & Experts</i>

6. Exposure

The exposure matters in the performance of sporting talent. Trainings in international academies and under veteran coaches in budding stages is so important in the making of an athlete. If a talented footballer below 10 gets an opportunity in a global academy like Barcelona, his fate may change. Always we regret where PT Usha didn't get an international exposure otherwise she would be an Olympic winner.

We should plan and give exposure tours, coaching and matches to talented athletes and teams as whole. The Hockey India adopted such a strategy and gaining from it. On the same way we should invite International coaches, clubs and expert viceversa. Globally renowned academies are now interested in operating from even remote places where opportunities lies. We must have to seek this opportunities too.

It's a budding Economy while considering Sports. We need better exposure through national and international tie ups with individuals, institutions and organisations.

International Clubs

Renowned Academies

Sports Companies

International Sports Associations

Great Coaches

Sports Research Institutions

Sports medicine providers

Nutrition Companies

Sports Analysts

Equipment Providers

World class infrastructure providers

7. Industry Approach

While considering Sports as an Industry the approach shall be justifiable to the multiple elements and segments of the Sports sector. Everything should be accountable and sustainable. It is essential to identify the revenue generating streams. More activities are needed to reach into such mode where activities might be tangible. It shall develop not just profit but shall make the whole thing sustainable. International Olympic Association was running in loss for years earlier. FIFA was not profitable in the early stages. BCCI was a loss making organisation and there was no proper system in place. All these organisations were transformed into systematic working models and started making profits. They could contribute to the segment substantially. It changed the whole scenario. Club football has become one of the biggest area where huge volume of money is transacting. During the years Sports has become a big Industry and an Economic/finance pattern has been developed. Proper revenue streams have been identified. The world is considering Sports as a big Industry with huge potential. The growth rate and potential of Sporting Industry compared to other major Industries is much higher. The projection is highly ambitious.

In the state of Kerala, Sports is not a fully developed industry segment. It seems there are some mindblocks and hassles to overcome. In sports, only a few financial patterns and revenue streams are popularly known to Keralites.

While considering sports as a business or an industry these elements are essential.

Fans & Followers

Popularity, Acceptance

Spectators, Ticket Sales

Commercial Tie ups

Digital streaming & Subscription

Television Broadcast, Rights and Viewers

Celebrity Management

Transfer fees

Advertisements, Sponsorships and Branding

Crowd funding & Contributions

Membership fees and renewal

Sports goods- Manufacturing & Sales

Merchandising

Coaching Fee

Infrastructure rental

Usage fees for facilities

Event properties

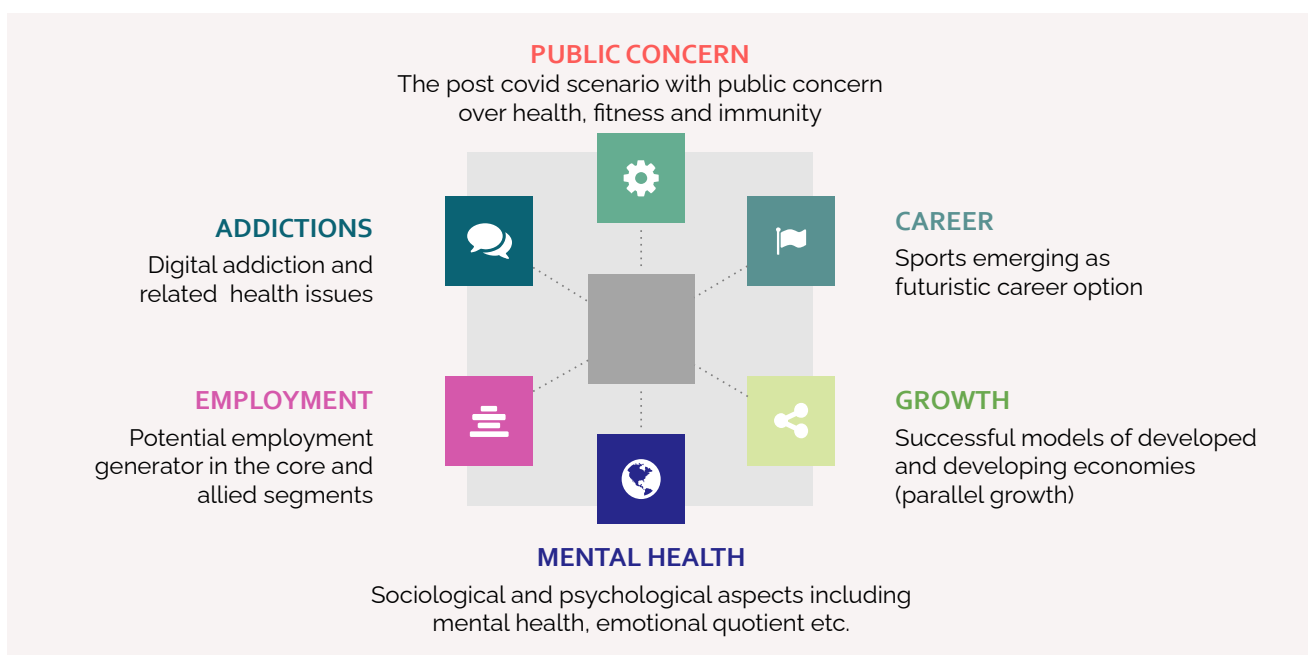
Government Funding

Special Taxes, Sess

Society development funds- Social Funding

Economy oriented approach is the vital element of this framework. Directly it has an impact on GDP/ GSP through various economic parameters. It will be contributed through well defined products and services which have no stake at present. The development of Sports will create more employment avenues and opportunities. In the post Covid perspective we need more focus areas of Growth in General where Sports has a crucial role. During the pandemic most of the economic activities went through a meltdown including manufacturing and retail. It has to be compensated with relevant and potential areas which is expected to contribute substantially.

While considering the global scenario, Sports is such a sector with enormous potential which is not yet tapped. Only a few developed countries took serious effort to mould an Industry approach. But the results are stunning. In the countries like United States, China, Australia and UK Sports industry is fast growing and the percentage of growth is so high in comparison with the conventional industry segments. It is also projected that the Growth will continue to a decade and more. There is no such effort initiated in countries like India where Sports still is a recreational thing. Even the Economic activities happening generally in the segment is not quantified. Kerala is advancing in this direction with this effort to Quantify entire sporting, related and allied activities and to develop a framework based on Economy credentials.



The Relevance- Indirect Impact- Health, Wellness, Fitness and More

Apart from the direct impact on Economy Sports plays a significant role in Fitness, Wellness, Physical Activities, Mental Health, Employability, Skill Development so on and so forth. It has a significant role in Indices like Health, Wellness and Happiness.

The Sports Economy is so impactful due to various reasons. There is a direct impact on the Economy through its GDP contribution. There are large volumes of opportunities in Sporting and Sports Oriented Employment. It will support Employability and Skill Development. The Indices like Health, Happiness and Wellness have an indirect impact. It complements aspects like Psychology, Emotion, Fitness, Preventive Health, Behaviour, Personality, Habits and Attitude. Clearly, there is a multidimensional impact that Sports Development can create.



We cannot limit the vast possibilities of Sports Economy with mere figures of produce and sales. The ultimate aim shall be quite holistic and extensive such as to reduce medical expenses of common man in general and to cutshort the healthcare spent of the Government in particular in future. Maintaining good health of people and society should be the ultimate objective of the mission.

Diabetics is considered to be the source of major diseases including Cancer, Heart & Liver Diseases, Kidney related issues so on. There are proven results that it could be controlled with proper physical exercises and controlling measures in food habits. Physical exercise, Fitness practices, Sporting activities, Yoga, Nutrition, Dietary etc are so vital in maintaining a healthy environment. Obesity, Cholesterol, Arthritis also can be controlled with proper physical/ sporting activities. The long term impact of health that comes from regular sporting activities is incomparable.

An extensive database and specific indices are to be developed for Diabetics, Obesity, Body Mass, Cholesterol etc and a control mechanism is also to be developed in parallel with massive special programmes as a part of this mission. In the larger interest of the Society, Investment in Sports is a long term investment for people with focus on health and long living.

Eventually the budget spent on health for infrastructure, facilitations, services and medicines could be cut short.

All Inclusive Sports & Sports for Change

- All inclusive sports/ Sports for all and Sports for change are the two taglines suggested for Sports Economy mission. It closely matches to the vision of the process.
- All inclusive sports ensure the participation of all segments. It will increase the level of the participation of various stakeholders. Sports become benefitted to all in different levels.
- Sports for Change is the concept of social transformation aimed to achieve through Sports.
- The campaigns are designed on these two themes basically.

ALL INCLUSIVE SPORTS

‘All inclusive sports’/ ‘Sports for All’ is the focus of the Sports Economy Mission. Everyone should get benefited in one way or the other through the participation in Sporting activities. The benefits might be economical, social, health oriented, psychological or physical. Every person in the state is going to be an Industry stakeholder, and most of them are customers also as per the vision. The Participation, Segmentation, Integration & Convergence and Collaboration will help to achieve the vision of All Inclusive sports.



SPORTS FOR CHANGE

The mission envisages that Sports should act as a catalyst of Growth and an agent of Change in Economy and Society. It influences the Social Change, Economic Change, Psychological Behavioral Change and Attitudinal Change. It will change the life , lifestyle and living standard of the people involved in it.



The Government spent will be ensured to be of moderate percentage through the effective participation of stakeholders in the newly evolving spectrum of Sports Economy. The State Government will continue as an effective facilitator to provide the utmost environment and eco system for the stakeholders. The mission will ensure private participation and private investments in large volume. Government will invite corporate and MNCs to make investments in infrastructure, Event Properties, Professional Clubs and Academies.

The mission gives assurance to the stakeholders that they would be benefited with their investments in multi aspects. Government will promote Startups and new entrepreneurs to come up with innovative ideas. The mission aims to attract NRIs to get involved in Sports based enterprises. Through effective interventions the mission channelizes the Corporate Social Responsibility Funds and Social Activation Funds. The crowd funding mechanism will be operated with the participatory model. The Govt PSUs running in profit will be involved in Sports. Cooperatives will be invited. Schools, Colleges, Educational Institutions, Local Bodies, and Rural Clubs will get effective participation through well designed schemes and programmes.

12.1. How the current facilities to be utilised in full swing

The infrastructure developed during previous years are underutilized whether it's large stadiums, swimming pools, shooting arenas or hockey turfs. The most important thing is that these facilities are vacant most of the days in every year. It's because of the lack of sporting events and coaching as these infra facilities are meant basically for that. Major infrastructure projects generate revenue from non sporting avenues like rental, entertainment programmes, attached facilities and so on. It's a welcome move that the facilities are making non sporting revenue but the core values shall not be ignored. A total revamp of the sector considering it as an economy is the only way out for that. More leagues, championships, coaching camps, regular coaching facilities, practicing for clubs etc comes with this total restructuring. It's an organic contribution of the suggested economy and the ecosystem developed with the evolution of the economy. For such an organic evolution all essential credentials are needed to fulfilled with consistent efforts and systematic procedures. If a stadium is being utilised for a league, the owner will get return for the facilities provided. If it is provided for coaching by an association for the practice for a national event, the association is supposed to pay. The event organisers are getting revenue from various sources such as gate collection, TV telecast, Digital streaming, Sponsorships, Branding and merchandising. The associations collect funds for training and other purposes in different models. They get sponsorships and have allocations from Sports Council and affiliated national bodies. When an event is being taken place a lot of activities related to trade, recreation, accommodation, food, sanitation etc will take place. More employment hours in part time and full time will be generated. If the

facility could be used on an everyday basis there will be an assured flow of money happening in one way or another. It will create an independent economy and will be beneficial to sports in particular and to the whole society in general.

12.2. How to manage the working capital requirements

It's always a concern that how the maintenance and the working capital shortage of the facilities could be managed. Sports Kerala Limited under Govt of Kerala is to facilitate the infrastructure and to maintain it in a sustainable and profitable manner, is a great step towards it. The first welcoming thing is that these facilities will be maintained properly. Earlier the facilities damaged with lack of proper maintenance. The organisation is managing all these under one umbrella is also a welcoming move. It has been under different entities and some of them are even without proper leadership and not being managed. The Government of Kerala has invested a lot in sports infrastructure in the last term of the Govt. and it is continuing. The last 5 year term itself saw an investment of Rs. 1000 Crores coming from KIFB. These investments are not under KSL at all. Some of the facilities are of schools, others are of local bodies, few are of associations like that. The major challenge is further maintenance and proper continuation of sports facilitations. If a school gets a 5 star sports facility and had all allocated funds been utilised for the construction purpose itself, then the continuation of sporting activities and proper maintenance would be a big question mark. In such cases participatory model of fund mobilisation in a long term basis is the only solution. In the case of Schools and Colleges such successful models are there. Management, PTA, Alumni, Corporate, Local Companies, Sports Entities, Local bodies and Public combined together can develop a fund mechanism to manage the entire sporting requirements. It includes their coaching, food, accommodation, jersey, materials, participation in the games and also properly maintaining the infrastructure built. Govt can provide only productivity/achievement based incentives to such institutions. They can increase the sponsorships and branding through better performance and can become sustainable in a few years.

12.3. How to shift from Govt funding to participatory resource mobilisation

There are a few models which have already been developed in such a way and proven successful. The Regional Sports Center in Kochi is developed and operated in similar manner. Govt fund involvement is limited with the property allocated. Further Govt has extended some supports through tax incentives and so on. It's a trust and the funds are mobilised from public through memberships. The operational income is coming from various coaching facilities, sporting venue rentals and also from recreational and non sports avenues including MICE. It is an adaptable model and can be worked out in any major city in the state.

12.4. More private sector investments

Sports is an attractive area of investments in multiple aspects. The private investors are investing in sports like any other sector to generate revenue and they consider this is an attractive investment proposition. But Sports investment is not just another profit linked investment but also a commitment to youth and the society. At the same time it can also benefit the investors in terms of monetary returns as well as better brand visibility and acceptance.

In 2022, the sports industry will continue to see an influx of money from new sources, shifting power dynamics in School, College sports, more widespread use of emerging technologies, and a greater focus on broader societal issues.

13.1. Scouting the biggest trends in sports

Sports industry outlook explores how these trends could create new opportunities and challenges for sports organizations, leagues, owners, teams, players, and fans. By the end of 2021, we saw most professional sports leagues and college athletics return to a relative sense of normalcy, with full seasons and live fans. We even got to experience the Tokyo Olympic and Paralympic Games. Hopefully, we are heading towards a future where empty stands, “bubbles,” and shortened seasons are no longer challenges. It has taken an enormous amount of planning and effort to get to this point, with the return to smooth operations dominating the efforts of many leagues, owners, teams, and athletes. When pandemic-era adversities fade, we can bring their lessons and innovations forward into a new future. The 2021 outlook of various consultancies highlighted the need for sports organizations to seek new and varied revenue streams and ways to forge deeper fan connections amid the pandemic. We also underscored the need for greater focus and action on equity and justice issues regarding race, gender, and LGBT+. We have seen some progress in this space, but there is more to do. We also see trends and opportunities that had been somewhat dormant during the pandemic emerging over the next few years. They have the potential to shift centers of power in the sports business, create massive new possibilities for growth, and cross-pollinate with each other.

sports industry outlook 2022 takes a closer look at these five trends:

1. We will see the blending of the real and digital worlds accelerate, with growing markets for data capture and analytics, e-sports, non-fungible tokens (NFTs), and immersive technologies.
2. College athletics will see some of its biggest changes ever, with student-athletes exercising more self-determination.
3. Blockchain-enabled innovations have a chance to open entirely new markets and options for fans beyond simple collectibles.
4. Sports betting has entered the mainstream, and companies will continue their relentless pursuit of new customers.
5. The role and duty of sports in society will continue to receive increased attention, with a focus on sustainability and mental health.

The digitization of sports is ongoing and transformative, spurred by growth in athlete data capture and analysis, augmented reality (AR) and virtual reality (VR) technologies, sports gaming and betting platforms, and more recently, the rise of NFTs. Sports organizations and media players are looking to combine the best of both the physical and virtual worlds. To do it, they’re adding digital enhancements to live events, including using the power of social media to engage. They are also trying to bring the energy, immediacy, and excitement of in-person experiences to the digital realm.

The use of VR and AR in sports has been increasing over the past few years, with new applications for

training and simulation, broadcasting, and in-venue experiences. With the greater deployment of 5G and its low-latency benefits, AR applications are multiplying.

Another major trend accelerating the merging of physical and virtual worlds is the rapid growth of sports-related NFTs. Leagues, individual athletes, and their partners are making digital collectibles, video clips, and enhancements to physical collectibles available for sale and trade. We have also seen a rise in the popularity of virtual/fantasy sports games like Sorare, that blend fantasy sports, NFTs, and real-world soccer into a completely new way for fans to engage.

Sports have always been able to transcend “the game,” serving as a way to reflect on who we are as a society and offering a chance to see both our progress and shortcomings. Sports organizations, teams, and players have embraced this role, and have influenced and improved their communities as a result. In 2022 and beyond, we will see the sports business continue to make progress, focusing more on the welfare of athletes, society, and the planet.

Mental health in sports has continued to gain attention in the past few years as more Olympic and professional athletes have spoken publicly about their struggles. In coming forward, athletes help to reduce the stigma around these issues, as well as encourage open conversations with their fans and teammates. The good news is that all major professional leagues have dedicated mental health professionals on staff among their available resources. But more attention is needed at the college level.

Environmental sustainability is becoming another increasingly important business goal, driven, in part, by more sustainably minded sponsors, fans, and professional organizations, like the Green Sports Alliance. All the major professional sports leagues now have green initiatives and are looking to reduce their overall environmental impact. These include projects and programs around recycling, renewable energy use, food recycling and donation, single-use plastics elimination, and LEED certification for venues.

For the development of sports infrastructure in the country including rural areas, Ministry of Youth Affairs and Sports was implementing the Rajiv Gandhi Khel Abhiyan (RGKA), the Urban Sports Infrastructure Scheme (USIS) during the year 2015-16. The Khelo India Scheme has been implemented by this Ministry since 2016-17. The Ministry is regularly interacting with the corporate entities both in public sector and private sector for making contribution to the National Sports Development Fund (NSDF) with the objective of development and maintenance of sports infrastructure.

Sports Authority of India (SAI), an autonomous organization under the aegis of the Ministry of Youth Affairs & Sports, is implementing a number of sports promotional schemes across the country to identify talented sports persons in the age group of 8-25 years and nurture them to excel at national and international competitions. The scheme of Assistance to National Sports Federations (NSFs) implemented by the Ministry provides for financial assistance to NSFs for various supports to athletes including organizing coaching camps, engagement of foreign coaches, procurement of sports equipments etc. Under NIP, capital expenditure of INR 9,069 crore (FY20-FY25) has been earmarked for developing sports infrastructure in the country.



14.1. More focus on Sports in New Budget allocations

Country's tremendous success at the Tokyo Olympics seems to have influenced the sports budget as the central government has allocated Rs 3062.60 crore for sports for the financial year 2022-23 -- an increase of Rs 305.58 crore, compared to the last year's amount. In the last financial year, the government had allocated Rs 2596.14 crore for sports, which was later revised to Rs 2757.02 crore.

India won seven medals, including a historic track and field gold, at the Tokyo Olympics. The sporting activities have also resumed in a phased manner in the country and 2022 is an important season because of two global events - the Birmingham Commonwealth Games and Hangzhou Asian Games, lined up.

Considering all of it, the government may have decided to spend more on sporting activities.

The government's flagship Khelo India programme witnessed an increase in funds of Rs 316.29 crore in the 2021-22 budget. The financial allocation towards the Khelo India programme, which got Rs 657.71 crore in previous budget, had been increased by Rs 974 crore.

training and simulation, broadcasting, and in-venue experiences. With the greater deployment of 5G and its low-latency benefits, AR applications are multiplying.

Another major trend accelerating the merging of physical and virtual worlds is the rapid growth of sports-related NFTs. Leagues, individual athletes, and their partners are making digital collectibles, video clips, and enhancements to physical collectibles available for sale and trade. We have also seen a rise in the popularity of virtual/fantasy sports games like Sorare, that blend fantasy sports, NFTs, and real-world soccer into a completely new way for fans to engage.

Sports have always been able to transcend “the game,” serving as a way to reflect on who we are as a society and offering a chance to see both our progress and shortcomings. Sports organizations, teams, and players have embraced this role, and have influenced and improved their communities as a result. In 2022 and beyond, we will see the sports business continue to make progress, focusing more on the welfare of athletes, society, and the planet.

Mental health in sports has continued to gain attention in the past few years as more Olympic and professional athletes have spoken publicly about their struggles. In coming forward, athletes help to reduce the stigma around these issues, as well as encourage open conversations with their fans and teammates. The good news is that all major professional leagues have dedicated mental health professionals on staff among their available resources. But more attention is needed at the college level.

Environmental sustainability is becoming another increasingly important business goal, driven, in part, by more sustainably minded sponsors, fans, and professional organizations, like the Green Sports Alliance. All the major professional sports leagues now have green initiatives and are looking to reduce their overall environmental impact. These include projects and programs around recycling, renewable energy use, food recycling and donation, single-use plastics elimination, and LEED certification for venues.

The total spend in encouragement and awards to sports persons have seen a substantial increase from Rs 245 crore to Rs 357 crore. At the same time Sports Authority of India's (SAI) budget was reduced by Rs 7.41 crore to Rs 653 crore. SAI is the nodal organisation to manage nationals camps, provide infrastructure, equipment and other logistics to the country's sports-persons. The allocation towards the National Sports Development Fund was also reduced by Rs 9 crore to Rs 16 crore. At the same time the National service scheme has witnessed a whopping jump of Rs 118.50 crore from Rs 165 crore to Rs 283.50 crore.

The allocation towards National Sports Federations (NSFs) remained untouched at Rs 280 crore.

As far as incentives for sports-persons are concerned, the budget has proposed a minimal hike up to Rs 55 crore. The budget for the National Sports Development Fund has been further reduced to Rs 16 crore from Rs 25 crore.

14.2. India Corporate spend in Sports

In 2019-20, the entire budget for the organization that governs hockey in India amounted to just Rs 48 crore. This was the pool of funds available with Hockey India to pay players and coaches, hold competitive events, support state units, build sports infrastructure, and promote the game. By comparison, the body that governs cricket in India earned an income of about Rs 4,000 crore in 2018-19.

India's spending on sports other than cricket is rising steadily, but the gap in comparison with cricket is huge. India can draw lessons from the turnaround models of other nations. For instance, UK Sport, which was set up to increase UK's Olympic medal count and spent about Rs 1500 crore during 2019-20 alone. The bane of sports in India beyond cricket is that the combined income of all the sporting federations put together won't even add up to a quarter of the country's cricket control board. And the situation is barely improving.

For instance, in 2009-10, the income of Hockey India was Rs 33 crore, which shows the paltry growth over one decade. Even of the Rs 48 crore in 2019-20, Rs 7.6 crore went towards running its own office, including legal expenses of Rs 3.5 crore. If this was a private corporation that was accountable to its shareholders, the situation would have been different. Be it financial, structural or building sporting ethos, the imperative for Indian hockey, and other sports, has to be greater. While Tokyo 2020 was India's most successful Olympic campaign, it is also tempered by the feeling that it could have delivered more.

An essential fuel to enable that is the support extended to Indian sports-persons. The Indian sporting framework beyond cricket sits on four pillars. The first, and the main one, is the Union government. Then, there are sporting federations, state governments and the private sector. Until the outbreak of the covid-19 pandemic in March 2020, support from the Union government had been increasing. The trajectory, though, was uneven. Between 2015-16 and 2018-19, the annual increase in budget allocation by the Centre on sports ranged from 3-10%. During the run-up to Tokyo Olympics in 2019-20, the spending surged 57% to Rs 2,327 crore. But in 2020-21, the pandemic year that also compelled organizers of the Olympics to postpone the sporting event by a year, it tumbled 31% to Rs 1,601 crore.

The corporate sector's support to build Indian sport (beyond advertising and private leagues) is significantly small compared to the government. Classified as corporate social responsibility (CSR) funds, private sector investments in Indian sports account for about Rs 250-300 crore in a year.

This overall outlay, as well as the vision and execution, pales in comparison to successful sporting nations such as UK and Australia, which finished fourth and sixth, respectively, in the 2020 Tokyo Olympics. Adjusted for population, their Olympic medal hauls are among the best. Australia's sports budget in 2020-21 was around \$370 million Australian dollars (about Rs 1,850 crore). India, with a population of about 50 times Australia, spent 14% less. The dramatic transformation of UK as an Olympic behemoth offers hope for India. Following a dismal show in the 1996 Olympics, where it finished 36, Britain has over the years overhauled its sports landscape. Sports management was professionalized, and UK Sport, a government agency, was set up as a singular entity to enhance its Olympic medal count. In 2019-20, it spent £146 million (about Rs 1,500 crore). India can draw lessons from the turnaround models that other countries have adopted.

14.3. Central advance and retreat

Whatever money the Indian government spends on sports is channelled via the ministry of youth affairs and sports. The Union budget outlay on sports is classified under two broad categories. The first is 'encouragement and awards to sports-persons', which includes support to sports federations, awards and incentives. The second is the 'Khelo India' scheme, which aims to build a culture of sports in India from the grassroots, and upwards via infrastructure, competition, and opportunities.

However, the actual spend under both these initiatives has been lower than the budgeted amount in recent years. For instance, the Rs 428 crore expenditure under the flagship Khelo India scheme was just 42% of the budgeted Rs 1,015 crore. The spend on encouragement and awards to sports-persons increased from Rs 317 crore in 2018-19 to Rs 494 crore in 2019-20 due to targeted schemes for Olympians. But with the Olympics postponed by a year, this tumbled to Rs 180 crore in 2020-21

As per the Indian Constitution, sports come under the ambit of states, and there is no law governing sporting activities for the entire country. To address this issue, the Union ministry of youth affairs and sports notified the National Sports Development Code in 2011, which specified the principles for good governance of all national sports federations (NSFs). However, there is a lack of clarity over whether these principles are binding on various sporting bodies and institutions. In addition to the NSFs, the key government

stakeholders managing sports are the Sports Authority of India (SAI) and the Indian Olympics Association (IOA).

The sporting entities in India have a legacy of fiefdoms, opaqueness, corruption and a lack of compliance, which has even resulted in bans from the international agencies. In addition, these federations have struggled to raise finances. Even with just Rs 48 crore, Hockey India is one of the better-endowed federations in India. The shooting federation reported an income of Rs 26 crore in 2019-20, the boxing federation Rs 23.4 crore in 2018-19 (the latest period available), and the athletics federation Rs 3.4 crore in 2019-20. These are sums that would be the marketing budget of a mid-sized company.

14.4. Direct to sports-persons

Government funding for athletes in India is broadly through assistance to sports federations along with incentives and support for promising individuals. In 2020-21, the Centre spent Rs 180 crore on sports federations, incentives, and the National Sports Development Fund (NSDF). The NSDF, managed by a council instituted by the Union government, is the nodal fund through which assistance is routed to sports-persons. In addition to the Centre, states, corporates and individual citizens can contribute to the NSDF. In the 20 years of the NSDF, non-government donors, led by public sector undertakings, have contributed about Rs 160 crore to the fund. These funds are then disbursed to athletes and sports foundations based on a review of applications. According to the 2018-19 NSDF annual report, a sum of Rs 61.3 crore was disbursed to 386 sports-persons across 22 disciplines till 2018-19. Shooting received the most (Rs 28 crore), followed by athletics (Rs 9.6 crore). Another Rs 116 crore was distributed to 80 sports federations and private institutes.

There are 28 main categories and 44 sub-categories of sports and games in Olympics. Total micro categories of the events for men are 156, for women 147, and 18 are mixed. Total micro categories/events come to 321. There are many popular sporting / gaming events including Cricket and Kabaddi, which are not included in the list. Indigenous sports items such as Boat Race are also not included.





We can categorise these sporting items into four broad segments. The popular sports, the olympic sports, the potential sports and the indigenous items. We can not mark a rigid boundary as several items may fall under one or more segments. Some popular sports may not even come in these categories. Cricket is a great example. In Indian perspective, Cricket is the most influential game but not included in the Olympic games. But it has got World cups in various formats.

15.1. Popular Sports

Among them the popular sports get much more importance and priority as these are playing all across the state and more people are engaged with it. It creates more opportunities in core and allied areas. More regular activities are happening there. Scope of economic activities such as events, coaching, professional clubs are there in popular sports. As people get attracted with it better involvement in all aspects could be expected. The potential of growth of these items are evident. There is a supporting system for these popular sports in National and International levels associated with the affiliated bodies, Sports Council, Olympic Council and though Govt. mechanism. In a developing economy popular sports get more priority and thrust. Major chunk of the economic activities are happening around it. Football, Cricket, Volleyball, Basketball, Athletics, Swimming, Cycling and Badminton are the most popular sports in Kerala.

15.2. Olympic Sports

The Olympic Games are the world's only truly global, multi-sport, celebratory athletics competition. With more than 200 countries participating in over 400 events across the Summer and Winter Games, the Olympics are where the world comes to compete, feel inspired, and be together. The evolution of the Olympic Movement during the 20th and 21st centuries has resulted in several changes to the Olympic Games. Some of these adjustments include the creation of the Winter Olympic Games for snow and ice sports, the Paralympic Games for athletes with disabilities, the Youth Olympic Games for athletes aged 14 to 18, the five Continental games (Pan American, African, Asian, European, and Pacific), and the World Games for sports that are not contested in the Olympic Games. The Olympic Movement consists of international sports federations (IFs), National Olympic Committees (NOCs), and organising committees for each specific Olympic Games. As the decision-making body, the IOC is responsible for choosing the host city for each Games, and organises and funds the Games according to the Olympic Charter. The IOC also determines the Olympic programme, consisting of the sports to be contested at the Games. There are several Olympic rituals and symbols, such as the Olympic flag and torch, as well as the opening and closing ceremonies. Over 14,000 athletes competed at the 2016 Summer Olympics and 2018 Winter Olympics combined, in 35 different sports and over 400 events. The first, second, and third-place finishers in each event receive Olympic medals: gold, silver, and bronze, respectively.

15.3. Potential Sports

The potential sports of the State is defined with various considerations such as the popularity, geographical parameters, possibilities of developing new sports, availability of talents, potential of winning in any of the items in Olympics or World Championships. If we take Water Sports as a segment to give more thrust there is indeed enough potential for Kerala. The state has a rich culture of talented swimmers. Boat Race is a popular indigenous sports of Kerala. Canoeing, Kayaking, Rowing etc have immense potential as Kerala is rich with backwaters and other water bodies. Adventurous sports also have such a potential in the State as there are many water bodies including 44 rivers so on. In fact the state has not yet assessed the potential of Water Sports with a vision to mould talents, increase coaching facilities, create events and nurture a culture. Swimming is a wonderful physical activity that contributes to the physical fitness of a community at large.

There is equal potential for Indoor sports. Especially in Badminton, Tennis, Squash, Table Tennis, Billiards etc. Talents are there and an ecosystem is being developed with the interest of people in such sporting items. The variants of popular items also need more attention. 3x3 Basketball, Beach Volleyball, Water Polo etc to be considered in such a perspective. There are enough chances of winning any of these world championships because of the less popularity of a few selected items.

Futsal is a unique different format of Football where 5 players on both sides and is an organised sports. Fifa is organising world cup for Futsal. The game is considered as the best practicing feeder sports of Football. With the emergence of smart sports arenas Futsal has great potential to grow and emerge in the State.

15.4. Indigenous Sports

Kerala has developed a few interesting sporting items which are unique and locally flavored. These are not just performing sports, but the ones with enough potential of developing as cultural and tourism products. Boat Race is an emerging sporting item which is very popular in Kerala. Many championships are conducted in different places. Now the Boat league has consolidated such efforts and has been developed as a beautiful tourism extravaganza. This is the team sports with maximum number of players in a single team. The visual brilliance is also a highlight of Boat Race. It has attracted lot of Film and Ad creators of top global brands. The Boat League has to be developed as an interesting TV product and tie ups with International Television Channels are needed in future.

The Sevens Football, a native format of Soccer is a very popular sports in Kerala and it has a vast potential in the future. Still it is not authorised by the Football Association. A high level intervention is essential to develop Sevens, the Kerala originated format of soccer. A league was started for Sevens years back and couldn't continue because of various circumstances. The Sevens is deep rooted and still in the unorganised status.

The Tug of War is another major local sports which is popular across the state. Many championships are being organised in the nook and corner of the state. It's still not approved by the authorities and a framework is needed on binding its rules and regulations. The competition structure is still complicated and to be simplified. Tug of War has the similar potential as Kabadi, a popular sports in the country which was moulded and emerged successfully within a decade or more. Similarly Tug of War can also be developed with proper branding. Technical, Sports and Management inputs are necessary to build it as a professional sports.

On this framework we need more inputs, feedback, expert versions, stakeholders, partners, and tie ups for the better fulfilment of the mission. We have suggested here a sequence of events. It may enhance the concept with better inputs and participation.

The State essentially needed a proper statistics of Sports Infrastructure, Facilities in different segments, Coaching Centres, Event properties, Rural events and so on. It shall be a detailed mapping of current facilities and infrastructure. By this we should aim to capture a complete data of the current scenario of sports in Kerala. It will be a valuable data for the Kerala Sports Economy Mission. The Data is needed to capture from the root level ie from the local bodies- Grama Panchayath. It's the primary data and is sourced from the root level survey. We have to list the components of the baseline survey/ geographical mapping to get the primary data. The available secondary data is to be incorporated along with that. As part of the Content/ Information gathering the following essential details are to be collected and segmented.

16.1. Core Segment

1. Stadiums of National/ State standards
2. Panchayath/ Municipal Grounds
3. Professional Clubs
4. Amature / Recreational Clubs
5. Walkways
6. Cycling tracks
7. Swimming Facilities
8. Sports Arenas
9. Sports Complexes
10. Sports Academies
11. Coaching Facilities
12. Fitness Centers
13. Gymnasiums
14. Yoga Centers
15. Recreation Clubs
16. Exclusive Sports Retailers
17. General Sports Retailers
18. Sports Goods Manufacturers
19. Apparel Manufacturers
20. Coaches
21. Players
22. Referees
23. Officials, Organisers
24. Prominent Former players/ Coaches/ Officials

16.2. Supplementary Segments

1. Yoga Centers
2. Ayurveda Centres with wellness facilities
3. Nutrition Product Manufacturers
4. Nutrition products retailers

16.3. Complementary Segments

1. Libraries
2. Residence Associations
3. Religious institutions
4. Social Networking Clubs
5. Schools, Colleges, and other Educational Institutions
6. Companies in different levels
7. Institutions
8. Cooperative Societies
9. SME's

16.4. How it's so relevant

A proper data mining and subsequent studies will give a crystal clear picture on the current status of sports sector within the state, which is essential for effective planning. It is evident that the investment of Govt. in sports especially in previous years were not based on proper studies or requirement. It brings the notion that the distribution of funds happened basically with regional interests. This issue is to be addressed on urgent basis, since investments in such manner will not create any results at all.

16.5. Not mere data mining

The suggested geographical and social mapping on each local body is not just data collection of the facilities and requirements. We have to go deep to grab the social background, local history, achievements, culture, aspirations and trends of each region.

On this framework we need more inputs, feedback, expert versions, stakeholders, partners, and tie ups for the better fulfilment of the mission. We have suggested here a sequence of events. It may enhance the concept with better inputs and participation.

17.1. Conclaves

Opening and Conclusion with massive Online- Offline Seminars to be complemented with micro level programmes. The micro events shall be in root level including the local bodies. Encourage sports associations, organisations to conduct such programmes. Media also can be a part in organising this. These conclaves aim to create an ecosystem and to generate better ideas from the sports fraternity. It should be completed in a prescribed time frame. The output shall be comprised in a hub for further processing and analysis. This outcome could be contributed to the State Sports Policy.

17.2. Hackathon

To get better ideas with an out of the box approach. It will be an initial step to promote the startup environment in Sports. Ideas are to be compiled and evaluated for further process. Good ideas to be acknowledged and materialised. It shall be linked to the policy framework too.

17.3. Investor Meets

The private participation is essential to move to the next phase. Corporates in national and state level to be participated in the process. They should invest in sports and in allied areas. We have to create attractive propositions and develop a better environment for it.

17.4. Campaign

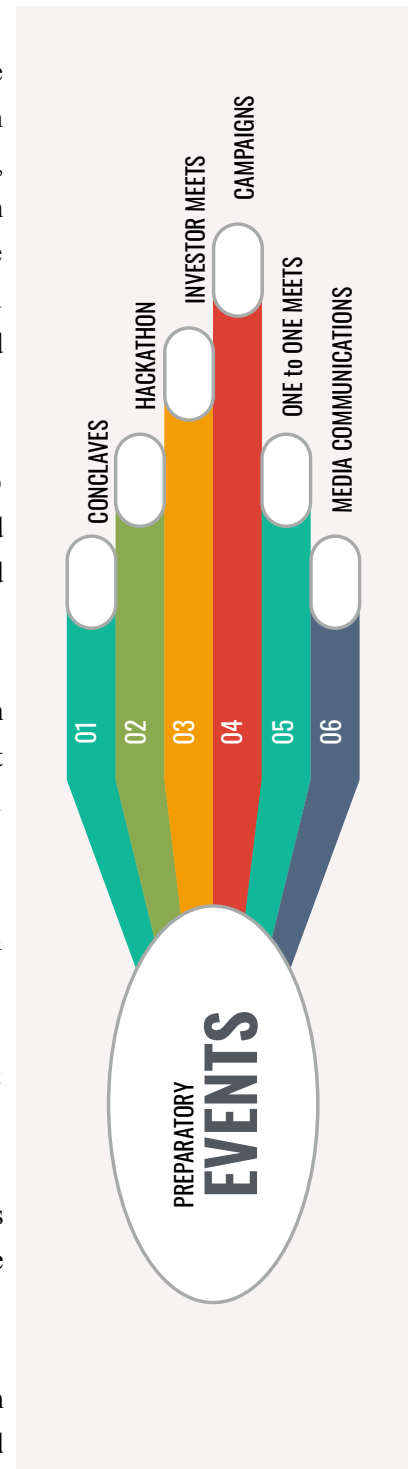
It's essential to create an environment and backdrop to develop such an economy. A massive campaign focusing the Post Covid scenario will be timely. An integrated, cost effective campaign is suggested. The focus is to attract everyone to Sports. Sports for All will be the crux. All should get advantage from the Growth.

17.5. One to One Meets

Planned one to one meetings with stakeholder community on a priority basis is the next phase. It shall be truly result oriented and these should be conducted only after primary discussions.

17.6. Media Outreach

Continuous and uninterrupted flow of communication through both conventional and digital media will manage the entire project as live and time-bound.



Leads to Schemes, Projects and Programmes

Few thrust areas are identified which are considered as the catalyst of growth. It has been evolved from the Vision, Approach, Basic Principles and the Strategy. It leads to Schemes, Projects and Programmes. Various programmes are being planned on these thrust areas. Identifying the thrust areas is the foundation for shaping up the projects.

**TALENT HUNT**

We have to start preparations for the next big things like Olympics. Start early to achieve more. We can design schemes with the target of Olympics, National Games, National Championships etc. Potential in each sporting item, included in olympics is to be analysed.

COACHES TRAINING

Different programmes are needed to develop excellent pool of coaches that may change the entire scenario. Good coaches shape the talents and create champions.

DEVELOPING CENTRES OF EXCELLENCE

We need numerous Excellent centers to mould hundreds and thousands of talents in the state. It could be Schools/ Colleges/ Clubs/ Academies.

WELLNESS WITH A SPECIAL FOCUS TO AYURVEDA

Invite world to explore the power of Ayurveda as a stream of sports medicine and a matchless tool of wellness. Promote well to make the concept bigger.

PLACEMENT FACILITIES

An organised system is needed to explore recruitments and job opportunities in the Sporting & allied segments.

SPORTS LINKED WITH TOURISM

We have unique indigenous sporting products/ Extravaganzas to sell as Tourism products too. We have

proven that with Kerala Boat League. Sevens has immense opportunities.

ATTRACT INVESTMENTS IN SPORTS

A massive drive is needed to grab investments in Sports. Investment of large corporates to sports startups are vital. More sports companies are to be emerged in Kerala.

ALL INCLUSIVE SPORTS

Inclusion of everyone in sports shall be a great mission. Special schemes for Women, Elders, Kids, Families, Communities, Organisations, Institutions etc will be ideal to achieve this. Schools and Colleges shall include sports in their Curriculum.

BE PART OF THE STARTUP REVOLUTION

We are looking for great startups in Sports similar to Byju's, Flipkart and Nykaa in other sectors.

FITNESS AS A PRIORITY

We have to promote fitness in different modes. Fitness Centers, Home Gyms, Fitness Centers in Institutions and in communities etc to be promoted. Cycling, Badminton, Swimming, Tennis like Sporting items are also to be promoted in the fitness perspective.

FOCUS ON SCIENCE, ENGINEERING AND MANAGEMENT

Sports will not stand out without the support of Science, Technology etc. Such efforts are needed to reshape the sporting scenario.

ASSOCIATIONS TO BE STRENGTHENED

A special mission is to be run, to strengthen the associations and to make them self sufficient. BCCI is an excellent model for a self sufficient and profitable sports association. Collaborations and Tie ups are essential.

INFRASTRUCTURE THE PRIME

Excellent playstations, Sports Arenas, Turfs, Sports Complexes, Indoor Courts, Aquatic Facilities in Private sector. A target to be fixed in numbers along with a time frame to achieve the same.

MORE EVENTS, LEAGUES AND CHAMPIONSHIPS

More Leagues, More Championships, Beautifully designed event properties and an event calendar. It's essential to revamp the premium championships and tournaments.

TECHNOLOGY NETWORKING

An integrated platform with different interface for multiple stakeholders.

CULTURAL LINKAGE

Museum, Archive, Sports Film Festivals, Indigenous Sports with cultural extravaganza are few examples of cultural linkage with Sports.

SMART WALKWAYS, CYCLE TRACKS & OPEN GYMS

Public amenities to maintain fitness and health.

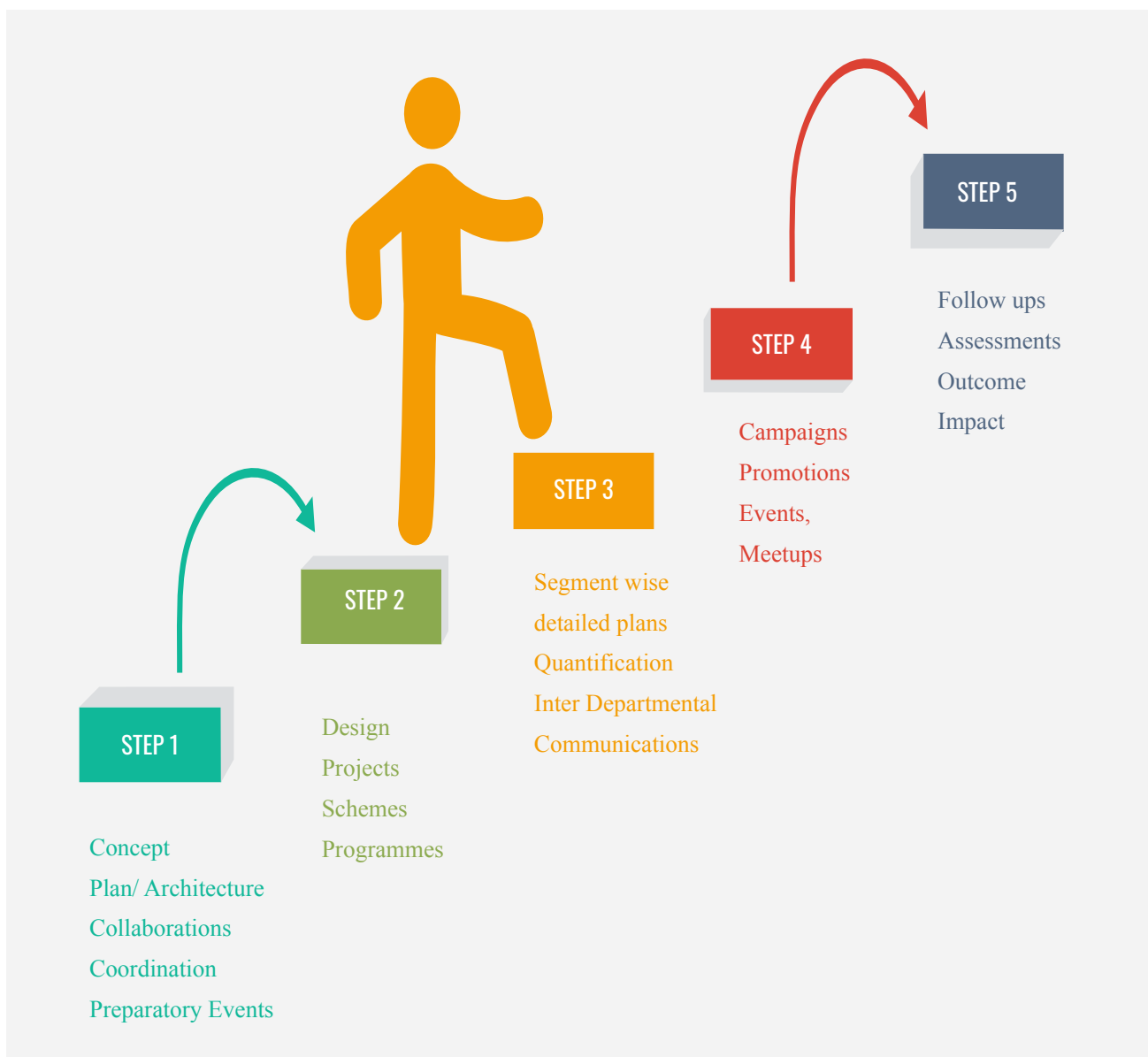
SEGMENT BASED SCHEMES

Address the segments like Kids, Girls, Women, Elders, Family, Community, Institution and design special programmes. Eg- Home Sports

MASSIVE DRIVE ON SPORTS SKILL

Programmes to provide basic skills in different sporting items to mass- especially kids. Eg. FIFA schemes of developing basic skills in Football through Futsal, Swimming Practice to all.

The step by step plans from ideation to the desired Goals are explained here. We have completed a few initial steps of the project. Concreting the idea/ concept was the first priority. It was then followed by detailing, quantification/ sizing, projection, segmentation and the analysis. In the present stage the segments are analysed in detail and specifically. The Sports Economy Sector and its segments are defined with better clarity. A brief plan of schemes sector wise and in general has been prepared. It has to be detailed further. Concrete schemes are to be evolved in the next phase. The impact of each schemes are to be assessed. The target has to fixed and a roadmap and a timeframe is to be made subsequently.



We have identified 25 major segments and 207 micro segments related with Core, Allied, Complementary and Supplementary activities which are either directly contributing or with the potential to contribute.

We have conducted a study with the secondary data to quantify each segment and its micro areas.

Focus- To achieve the growth in each segment, it is necessary to chalk out a perfect roadmap for every micro segment.

Plan- Projects, Schemes and Programmes for each segment is necessary

Connect- It shall connect and match with the Policy framework and General Guidelines of the State Government

THE SEGMENTS

These 25 Major segments are identified on the basis of the current sporting scenario and the potential of growth. This selection is purely on the aspects of revenue generation possibilities. Few sectors are not generating any revenue at present but it is included by considering the scope in future; also considering the global and national scenario.

1. *Sports Infrastructure- Construction, Maintenance*
2. *Fitness Infrastructure*
3. *Sports Equipment- Manufacturing*
4. *Sports Equipment- Retailing*
5. *Events- Championships, Leagues*
6. *Coaching & Training*
7. *Sports Education, Management, Engineering & Media*
8. *Sporting Clubs*
9. *Sports Medicine*
10. *Fantasy Games*
11. *Media- TV, Digital & Print*
12. *Startups*
13. *Nutrition, Wellness*
14. *High Value Sports*
15. *Adventure Sports*
16. *Non Conventional Sports*
17. *School, College Sports*
18. *Sports Operations*
19. *Allied Services- Complementary Sectors*
20. *Sports Technology and Science*
21. *Indigenous Sports*
22. *Sports Tourism*
23. *Sports Branding, Marketing*
24. *Fitness and Sports based public amenities*
25. *Services, Facilitation*

SPORTS INFRASTRUCTURE - Segment Overview

Sports infrastructure is the most significant contributor in the Sports Economy perspective. It includes Multi Purpose Stadiums, International Stadiums, Stadiums in different standards and levels, Sports complexes, Aquatic Complexes etc. Majority of them are Govt. owned and managed. Modern Turfs and Arenas have become a game changer. It came up with the entrepreneurial aspiration and the passion of youth to play, across the State. The private sector investments has increased in the avenues like Sports Complexes, Turfs, Academies etc. Trusts, Social Organisations, Social Clubs also have come up with these types of facilities. Govt still continue huge investments in Centers of Excellence for Sports infrastructure. We have Golf Course like high value sports facilities and modern sports amenities. The new infrastructure will boost construction industry at large. As sports infrastructure improve, more events will be taken place. It increases the demand of temporary facilities and providers like Galleries, Flood Lights etc. Education institutions are building up good infrastructure like Turfs, Wooden Courts, Aquatic Complexes, Tennis Courts and Net practicing facilities. Direct sporting income, venue rental, facilities rental, training, construction, purchases, recreation etc. generate revenue and the sector can contribute substantially to Sports Economy.

SPORTS INFRASTRUCTURE - MICRO SEGMENTS

<i>Large Stadiums</i>	<i>Medium Stadiums</i>	<i>Mini Stadiums</i>
<i>Sporting Turfs and Arenas</i>	<i>Sports Complexes</i>	<i>Indoor Courts</i>
<i>Synthetic Tracks</i>	<i>School, College Grounds</i>	<i>Cricket Pitches</i>
<i>Volleyball Courts</i>	<i>Basketball Courts</i>	<i>Aquatic/ Swimming facilities</i>
<i>Badminton Courts</i>	<i>Golf courses</i>	<i>Net practice Centers</i>
<i>Construction and Facilitation</i>	<i>Tennis Courts</i>	<i>Temporary Facilities</i>
<i>Throw, Jumping Pits</i>	<i>Billiards, Snooker Boards</i>	<i>Grounds owned by local bodies</i>
<i>Rural small grouClay/ Mud courts - Football</i>		

SPORTS INFRASTRUCTURE - POTENTIAL AREAS AND STRATEGIES

Potential Area- ARENAS AND TURFS

Advantage - People are ready to use this by paying. All these facilities have own business and revenue models. It's proven as it's replicated across the state.

Status- It's a trend setter and is growing rapidly. There are enough opportunities to grow this in multiple folds. The business model is perfect.

Requirement-

1. Attract more investors by providing incentives, tax exemptions etc.
2. Organise frequent programmes to develop the Skills of Entrepreneurs to equip them to grab more opportunities and income
3. To equip them with optimal utilization, additional revenue generation avenues in the infra and proper marketing.
4. Develop technology based networking tools to increase the user base. It shall be a project of any startup
5. Receive the inputs of Management experts and institutions to streamline the business flow.
6. Provide leverage through proper coverage in Media.

Potential Area- SPORTS COMPLEXES

Model- Regional Sports Centre, also known as Rajiv Gandhi Indoor Stadium is a multipurpose sports centre in Kochi, Kerala, India. The stadium is situated in 4 acres of land. The centre has the facilities for badminton, tennis, basketball, table tennis, swimming, billiards and indoor cricket nets. It's a PPP model and the centre is running in breakeven status.

Potential- There is enough potential to replicate the model in all major cities and in Towns in Kerala.

Possibilities- PPP Model/ Private Investment

Requirement-

1. Investor meets to attract Private investments
2. Identifying potential cities
3. Initiative to build more PPP model initiatives to attract stakeholders in different destinations
4. Proper management studies to streamline the business model and revenue propositions.
5. Identify more avenues and methods for revenue generation- Rental, Recreation, Conferencing etc- RSC is a great example
6. Participation of Management experts and Institutions to contribute in Business Model.
7. Offer from the Govt in certain areas like Subsidies, Incentives, Tax Exemptions.
8. Adoption of fabricated building and construction methodologies suggested to avoid initial costs. It is also better for further alteration.

Potential Area- Swimming & Aquatic Facilities

Model- Bangalore has become India's swimming capital with professional and recreational swimming.

Advantage-

1. User paid model is receptive across the State
2. Schools and Colleges are developing facilities. Public is using the facility with a paid model. Students are also paying fees.
3. There is an aspiration among people without age bar to practice swimming
4. Swimming is considered as one of the best physical fitness modes and is widely accepted.
5. Recreation Clubs are also developing such facilities.

Requirement

1. More aquatic facilities are needed as opportunities increase
2. Motivate Schools, Colleges, Clubs to initiate
3. Attract more private investments
4. Kids and teenagers are to be engaged more. For them it's an attractive sporting item too.

Potential Area- Indoor Courts- Badminton, Tennis, Basketball, Volleyball

Model- Facilities of YMCA

Advantage-

1. User paid model, monthly fee model is generally acceptable across the State
2. YMCA, Lions Club, Rotary like clubs are developing facilities and running successful models.
3. There is a huge demand of indoor sports in recreational, fitness and training purposes
4. Indoor games are widely accepted as a method of developing fitness.
5. Kerala has developed large number of talents in Badminton, Tennis, Basketball, Volleyball etc
6. Schools and colleges are interested in indoor sports facilities and training.

Requirement

1. More indoor facilities across the state in user paid model
2. Motivate Schools, Colleges and Clubs to be part of the initiative.
3. Attract more private investments
4. Kids and teenagers are to be engaged more. For them it's an attractive sporting with huge potential to develop themselves.
5. The associations should take care of developing basic infrastructure.

Potential Area- Cricket Grounds and practicing facilities

Model- Facilities of KCA- Thodupuzha, Wayanad, Perinthalmanna.

Advantage-

1. Huge demand for Cricket- Recreation, Institutional and Training
2. User paid model, Monthly / yearly rental basis are generally acceptable models.
3. As more space is required, the facilities are less and opportunities are more at present.
4. The Green Turf revolution has inspired Cricket enthusiasts to develop such good facilities
5. Kerala has already started contributing Cricket talents to National and International levels.
6. Kerala Cricket Association is proactive and the BCCI is a cash rich organization which can contribute significantly to its state organisations.

Requirement

1. More Cricket pitches, Grounds and Net practicing facilities
2. Attract more private investments
3. Make use of waste lands and underutilized properties.
4. Adopt temporary and cost effective construction methods
5. Utilise the schemes of BCCI through KCA
6. Leverage the passion of enthusiasts towards Cricket.

Potential Area- Large, Medium and Small Stadiums

Model- Nil

Advantage-

1. Large number of spectators in popular Sporting Items
2. Government investments for the common interest
3. Kerala, always been, sports Organisers' favorite destination because of large crowd support
4. Development of National leagues in various sporting items
5. General hope in Kerala Sports Foundation that the present challenges with infrastructure facilities will be sorted out.
6. Scope for 2, 3 tier cities and rural areas.

Requirement

1. Need of a PPP Model
2. Restructuring of the revenue model - More revenue generating streams - Rental, Conferencing, Recreation, Foodcourt, Exhibitions, Conventions etc
3. Proper need analysis for new investment in stadiums at new destinations
4. Attract private investment
5. Optimal utilisation of available facilities. More sporting events, Coaching, Leagues etc. Most of the current facilities are under utilised.
6. Increase the core sporting activities

Potential Area- Construction and facilitation

Model- Nil

Advantage-

1. Opportunities are huge due to various reasons including the developing economy
2. Government is doing big investments for the sporting facilities in Colleges and Schools
3. Increasing number of Turfs, Arenas and Indoor Courts
4. Projected development in the Sports Infrastructure
5. Increasing requirement for Walkways, Cycle Tracks and similar Public facilities
6. The concept of Sports for All

Requirement

1. Specialised companies for Sports based construction and facilitations including service.
2. Construction companies has to setup a special division for Sports.
3. Standardisation, construction protocol etc
4. Modern construction practices such as pre-fabrication for cost effectiveness and reduction in time consumption.

Potential Area- School, College Sports

Model- School - College Sports in USA

Advantage-

1. School - College Sports has got strong roots in the state.
2. Govt is investing more in Schools for Infrastructure
3. School Management is also interested in developing sporting facilities
4. Parents and Students are showing interest in Sports at present than ever before.
5. About 90% of the talents are developed from School, College Sports
6. Whether it's CBSE, Self Financing, Aided Sector- A few institutions have excellent facilities. They are producing good talents and excellent results.

Requirement

1. Despite having excellent track record in sports, some schools and colleges have poor facilities. This issue is to be addressed with priority
2. A PPP/ Participatory model can be worked out easily. Ensure Alumni, Local Business, Corporate, Parents participation.
3. Need analysis and performance assessment is essential on Govt. funding. It shall be meritorious.
4. The funds shall be restricted to talent hubs with proven track record.
5. Schools and Colleges shall focus on specialisations.
6. Certain facilities could be shared with public with user fee
7. Maintenance, Coaching, Working Capital etc to be included in the Annual budgeting of School, College Sports.
8. School, College Sports should be taken as a different vertical in State Sports. A unique approach is needed.
9. Categorisation and rating is essential.
10. CBSE, Self Financing Sectors are also to be included. The facilities can be utilised for public as well.
11. It is required ensure that all institutions have the basic facilities for sports.

FITNESS INFRASTRUCTURE - SEGMENT OVERVIEW

Special Focus on Sports Specialised Gymnasiums/ Fitness Centers

Fitness infrastructure is well defined and a fast developing sector in Sports related industry. It's an unorganised sector and widely spread across the state. Individual entrepreneurs and large corporates are present in the sector. Investment on an average fitness center is considerably big in size and interim investments and proper services are also needed. It is expected that the segment will grow in rapid pace because of public concern over health due to Covid related situations. The number of yoga centres are also increasing with the new lifestyle aspirations. Yoga practices are now considered as a sporting item and the central sports ministry has formulated the guidelines. It's also a boost to the segment. Women are getting more engaged in fitness activities. Local bodies are developing Smart walkways and Cycling tracks. Better fitness infrastructure and awareness leads to a big requirement of fitness equipment, apparel, footwear etc. The income comes through membership, usage etc. The economic activities are spread through multifacet activities including purchase of fitness equipment and so on.

FITNESS INFRASTRUCTURE - MICRO SEGMENTS

<i>Gymnasiums</i>	<i>Fitness Centers</i>	<i>Yoga Centers</i>	<i>Walkways</i>
<i>Cycling Tracks</i>	<i>Home Gymnasiums</i>	<i>Sports Specialised Gyms</i>	

FITNESS INFRASTRUCTURE - POTENTIAL AREAS AND STRATEGIES

Potential Area- Fitness Centers, Facilities

Model- Bangalore

Advantage-

1. Increasing concern over health and fitness, helps in developing the supportive environment
2. Interest of Private entrepreneurs- Large, Medium and SME
3. There is lack of good infrastructure in Tier-2, Tier-3 cities and in rural.
4. All sectors irrespective of gender and age group show interest
5. Pay to use on monthly basis has become a practice accepted widely.

Requirement

1. More centers, at least 2-3 folds of current number is essential to match the requirements
2. Promote private investments. Invite Corporate, Large networks to invest
3. Dedicated centers for Women, Girls, Kids, Aged
4. Fitness facilities with the work stations of the Institutions
5. Fitness facilities in Public place
6. More homes to be equipped with Gyms
7. Application, Programmes, Challenges, and Technology Integration are essential
8. Protocols for operators
9. Trainings and skill development programmes for trainers
10. Certification
11. More Scientific approach on fitness training

Potential Area- Public Fitness Facilities like Walkways, Open Gyms, Cycling Tracks

Model- Kochi Stadium, Marine Drive, Metro Cycling

Advantage-

1. The concern over health and fitness
2. Local Governments showing interest
3. Proper walkways are very less in number and demand is high
4. Local companies and public will support- Participatory model can be worked out.
5. People may be willing for minimal user fee.

Requirement

1. 1000 plus public walkways are required. At least one in each local bodies.
2. Local bodies should take responsibility and lead the initiatives.
3. Public Grounds can be utilised; Essential facilities like Lights, Safety measures, Tracks etc to be arranged.
4. Working models to be prepared with the standardisation, procedures and protocols.
5. Ensure the walkways along with roads ensuring safety; Otherwise, make proper arrangements including demarcation of boundaries at least.
6. Certain engagement programmes to be promoted such as Morning/ Evening walks, Community gathering etc.
7. It should develop as a community development activity to spread across the state.
8. Develop a model for the massive public fitness initiative
9. Promote Cycling Clubs- Focus on Recreation, Fitness and Sporting aspects.
10. Focus to develop sporting talents in Cycling in the evolving phase. Cycling is an Olympic item with 22 sport events.

SPORTS EQUIPMENT MANUFACTURING - Segment Overview

Tapping opportunities of sports good manufacturing in an emerging sports market where it gets benefited with an Industry approach

Sporting equipment, also called **sporting goods**, are the tools, materials, apparel, and gears used to compete in a sport and varies depending on the sport. The equipment ranges from balls, nets, and protective gear like helmets. Kozhikode has become a major hub for footwear manufacturing in South India. Paragon, VKC, Odysia like footwear majors have established themselves and other SMEs are emerging. Major companies are now focusing on Sports shoes, Jogging shoes, Running shoes etc. Now Government of Kerala is setting up a Sports manufacturing park/ hub/ cluster at Kozhikode. Sports equipment manufacturing will be a rising sector for Kerala as the state is a huge consumer market. Also the availability of raw material is high, especially Rubber and the components used for footwear manufacturing. Rubber is a great material input for sports equipment manufacturing. More researches are needed in the segment. The Rubber manual has identified hundreds of products. We can replace many popular products with rubber as their basic component. There is huge potential for export too. Kerala being large producer of natural rubber, huge potential is there for rubber based sports goods.

We have a tennis ball manufacturing company is at Kannur. The Jabulani footballs, which were used in FIFA World Cup was made out of Kerala latex!

Sports Equipment Manufacturing- An Indian Scenario

The words 'sports goods' have become synonymous with the passion that India is having for sports. The sports goods industry in India is nearly a century old and has flourished due to the skills of its workforce. Being labor-intensive in nature, the industry provides employment to more than 500,000 people. The nucleus of this industry in India is in and around the states of Punjab and Uttar Pradesh.

- Jalandhar in the state of Punjab and Meerut in the state of Uttar Pradesh account for nearly 81.8 per cent of total production.
- Together, the two towns house more than 3,000 manufacturing units and 130 exporters.
- About 60 per cent of the sports goods manufactured in Jalandhar are different kinds of inflatable balls.
- The Indian sports goods industry also has a presence in the cities of Mumbai, Kolkata and Chennai, albeit at a lower scale.

Bowling Over the World

Indian sporting goods are well known around the world and have made a mark in the global sports goods market. The industry exports nearly 60 per cent of its total output to sports-loving people around the world.

Sports Goods Export Promotion Council

The Sports Goods Export Promotion Council (SGEPC) promotes the export of sports goods and toys from India. SGEPC represents the leading 200 manufacturers and exporters of sports goods and toys in India.

SPORTS EQUIPMENT MANUFACTURING - MICRO SEGMENTS

<i>Jersey & Track Suit</i>	<i>Apparel</i>	<i>Fitness Equipments</i>	<i>Basic play equipment</i>
<i>Footwear</i>	<i>Raw material</i>	<i>Wooden Court</i>	<i>Balls</i>
<i>Trophies, Souvenirs</i>	<i>Green, Synthetic, Mud Turfs</i>		

SPORTS EQUIPMENT MANUFACTURING - POTENTIAL AREAS AND STRATEGIES

Potential Area- Goods & Equipment Manufacturing

Model- Jalandhar, Punjab

Advantage-

1. Big Consumer market and huge consumption
2. Kozhikode- South India's footwear hub
3. Kerala is seeking for new avenues in manufacturing to develop SMEs and employment
4. Kerala Govt has initiated procedures to develop a sports manufacturing hub
5. Availability of Natural rubber/ Latex which is one of the largest required raw material for balls.

Requirement

1. Special Clusters
2. Tap the potential of rubber based products for sports
3. Sports footwear with the Kozhikode Footwear Hub
4. An Industry summit is proposed with a special focus.
5. A detailed study is needed to analyse the potential, available raw materials etc.
6. Promote SMEs in the manufacturing of Apparel, Jersey, Souvenir, Trophy etc.

SPORTS EQUIPMENT RETAILING - SEGMENT OVERVIEW

Sports Equipment retailing is an emerging sector in Sports. Major multinational players like Decathlon have started Sports malls like big retail shops in cities and have a plan for fast widening in the state. Domestic players with multiple shops are also expanding. All major towns have one or more exclusive sports shops. Big supermarkets to small retail shops have sports goods in their product line. Fitness equipment dealt with exclusive shops are also available in sports shops and in general stores. Basically Kerala is a consumer state and demand is increasing in sports goods and sports lifestyle products. It will further increase with the improvement in Infrastructure, events, avenues and the level of aspiration. When more people get involved in Sports the demand will increase naturally.

SPORTS EQUIPMENT RETAILING - MICRO SEGMENTS

Exclusive Stores- Large

General Stores & Sales

Exclusive Stores- Medium

Fitness Equipment retail

Exclusive Shops- Mini

Toys & Playthings

SPORTS EQUIPMENT RETAILING - POTENTIAL AREAS AND STRATEGIES

Potential Area- Sports Goods Retailing- Retail Chains, SMEs

Model- Decathlon

Advantage-

1. Overall development, All inclusive approach - Infrastructure development will create huge demand for sports goods.
2. Decathlon, one of the largest chains in Sports goods is on fast expanding pace in the state
3. Kerala based retailers are also expanding in similar scale
4. It's a quite natural phenomenon that the demand will increase along with the emerging economy.

Requirement

1. Improvements in Infrastructure, Inclusion of people from all sects, Events at different levels, Academies and Coaching centers, Promotion of more sporting items, Segmentation etc lead to an increase of demand in folds.
2. Invite more retail chains like Decathlon who not just sell but make sense through experiential sales.
3. Equip SMEs and attract them for investing in setting up retail shops
4. Startups can integrate online opportunities of sales. Let it be open for them.

SPORTS EVENTS - SEGMENT OVERVIEW

Sporting Events is a core area and a major contributor of Sports Economy. The list of large sporting events in Kerala start from the ISL home matches of Blasters. It's a classical example for the potential of large sporting events. It generates revenue and has become a strong economic activity in multiple aspects. GEDA the owner of the match venue is getting Rent. Huge income is generated from Gate collections. Each match has telecast revenue. Direct and indirect sponsorships are there. The revenue is distributed to Team, Players, Associations, League Owners and also as tax income to Government and Local body. Temporary service providers like food, Digital boards, flex suppliers are also benefited. Lot of temporary jobs will be created. Print and media like service providers get opportunities.

The sporting events in the state are in different levels and standards. If we consider it altogether the volume of business, economic activation, revenue generation, employment opportunities, service activities etc are very high. The indigenous items and rural events also attract huge spectators. If it is promoted well it will be a gamechanger. Sevens Football, Tug of War and Boat race are attracting massive crowd.

When the League was developed in Boat Race the result was amazing. The economy of the Boat race starts from the construction of a new Snake-boat and the maintenance of old ones. Months long preparations and trainings follow it. The race is a big celebration for each regions. Numerous families and clubs are spending large amounts for it.

SPORTS EVENTS - MICRO SEGMENTS

<i>National Events</i>	<i>District level Events</i>	<i>State Level Events</i>
<i>State Leagues</i>	<i>District Leagues</i>	<i>Corporate Leagues</i>
<i>School, College- Special</i>	<i>School, College- General</i>	<i>Indigenous Sports</i>
<i>Rural sports</i>	<i>Institution & Organisation</i>	

SPORTS EVENTS - POTENTIAL AREAS AND STRATEGIES

Potential Area- Leagues

Model- ISL, IPL, Pro Kabaddi League

Advantage-

1. Sports Enthusiasm and Sporting Environment at present
2. ISL Matches conducted in Kochi were massive success in terms of Spectators
3. When Kerala Tuskers played in IPL, it was also a hit.
4. The number of Kerala Blasters fans and digital media followers are stunning.
5. Football, Cricket, Volleyball, Basketball etc are really popular and widely being played
6. KFA is planning for a turn around with commercial tie ups and a professional league. Hyderabad Football League is a success model

Requirement

1. We need well defined Leagues in Football, Cricket, Volleyball, Basketball, Hockey, Handball, Kabaddi like popular games.
2. Leagues shall be conducted at different levels- State, District. Football like so popular games can have leagues even in regional basis.
3. The concerned associations should take a lead role to structure the leagues.
4. It's suggested that a well defined commercial proposition is necessary for each league.
5. The matches are played on ground, the revenue comes from screens. Each league should be designed as potential screen products similar to ISL, IPL, Pro Kabaddi League etc.

6. The Architecture/ Programming of the leagues should be attractive
7. It is also suggested the the teams for the leagues should be in permanent nature.

Potential Area- Leagues for Indegenous Sports

Model- Kerala Boat League

Advantage-

1. Kerala is rich in Indegenous Sports
2. Kerala Boat League was a massive success and has great growth potential
3. Sevens League experiment was success
4. Tug of War also has the potential
5. Huge tourism potential is there with indigenou sports.

Requirement

1. Boat League should continue with better add-ons. It's a good screen product but needs improvements. Sony like MNCs shall be there to take the telecast rights.
2. Sevens is a unique product of Kerala. Need a professional approach to build up a professional league. Live telecast is must. ISL-Reliance like Commercial tie ups will enhance the proposed league.
3. A league in Tug of War is also proposed. It's rooted in Rural areas of the State.
4. A well defined commercial proposition is suggested for each league.
5. The Architecture/ Programming of the Leagues should be attractive

Potential Area- Sporting Events in Different levels

Model- Nehru Cup, Manchery to host Santhosh Trophy

Advantage-

1. The potential is Pan Kerala
2. Even in the rural part of the State, there's a receptive mindset
3. Kerala has hosted a lot of International and National sports events in grand scale successfully
4. The state has conducted premium championships in different locations every year and attracted large crowds.

Requirement

1. Tap the Potential of Tier-2, 3 cities and rural areas
2. Revamp the renowned championships and tournaments- Nehru Cup, Mamman Mappila Trophy, Nagji Cup, Sree Narayana Trophy, Thripayar Volley, Inter Collegiate Basketball and so on.
3. Be the host of more National, International Championships
4. As the facilities in different rural areas get improved, those small towns are supposed to get opportunities to host premium events. Thriprayar/Peravoor/ Vadamkara/ Kizhakkambalam to host National level volley championships. Perumbavoor, Thodupuzha, Chalakudy/ Mambad to host pro football events.
5. An event calendar listing full year's entire sporting activities is to be prepared. All associations in the State and District level to follow the pattern.

Potential Area- Rural Sports, Institutional Sports

Model- Local Football, Corporate Sports

Advantage-

1. Entire region has the potential and culture
2. Rural sports too attracting large number of spectators.
3. Sevens football tournaments are conducted in filled temporary stadiums
4. The IT parks are hosting Inter company competitions in professional way

Requirement

1. Promote rural sporting events and build excellent event properties.
2. Standardisation/ Rating procedure
3. Linkage with Tourism, Local flavor and Culture
4. Integrate with local Trade
5. An event calendar specially for rural sports.
6. Exemptions in entertainment tax
7. Guidance for proper branding and marketing
8. Identify 100 such local events for a makeover and to tap the whole potential.
9. Make these championships as Sports, Cultural and Tourism extravaganzas.
10. Promote institutional sports to engage employees in Sports
11. Ensure the participation of Women in inter institution sports
12. State to start a corporate league in popular sports in association with Industry organisations.

INDIGENOUS SPORTS

In football we have a special product - Sevens. It is played all around the state with massive crowd support. At least 100 major and around 300 small tournaments are taking place every year. The Sevens was originated in Kerala and is deep rooted. Foreign players are there in the Sevens Clubs. There were some efforts to professionalize it by bringing a League for Sevens Football. Now it's being played Goa, Tamil Nadu, Bengal, Mumbai and North East. Sevens is being played in highly Malayali populated Middle East too.

Boat Race is another major indigenous sporting item very popular in Kerala. It's attracting foreign spectators too. The Boat League with Television telecast was started 3 years back with Branding support. It has created great impact and shows potential of further growth like Pro Kabaddi League. Tug of War is another major local item widely being played in the state. Around 100 tournaments are taking place every year with large number of spectators.

INDIGENOUS SPORTS - MICRO SEGMENTS

<i>Events</i>	<i>Clubs</i>	<i>Training</i>	<i>Temporary Infrastructure</i>
<i>Sevens</i>	<i>Boat Race</i>	<i>Tug of War</i>	<i>Water Sports</i>

Case Study

Sevens- A Kick from India to the World Football

Sevens Football is growing like one of the most favorite sporting items in Kerala. It has generated massive interest in rural and suburban areas. The ease to form a team with 7 players as well as the requirement of smaller fields make it dearer to football lovers. In places like Malappuram and Kozhikode, there are already clubs which play sevens on a serious note. Thousands of spectators watch their local football heroes playing in different tournaments. It is becoming a mix of sport and culture and will be a sport to gain recognition as well as national and international importance in the years to come. Sevens Football is one of the most popular sports in Kerala and this venture is aimed at revamping this sport on a professional scale. Just as "20-20" started a new age in the history of Cricket, Sevens Football is expected to revolutionize Football in the near future. Sevens Football that had an extensive growth in northern Kerala due to its simple format, is now creating waves all across the state. Hundreds of tournaments are being organized every year during the season. Lakhs of spectators throng the galleries to cheer their favorite teams. Putting an international spotlight on Kerala's favorite sport item shall be the aim of the Premier League to come. It would be an incredible achievement if Kerala plays a role in helping Sevens Football to win recognition from FIFA. Kerala would become a happening spot in the World Football Map. This would not only help Kerala on the sporting front but also will boost its overall image. Thus Kerala's own sport can have international branding and positioning. Use of advanced technology, conducting the event on a professional scale, different publicity plans etc are to be used in order to revolutionize the face of football. At the same time the uniqueness and the popular face will be preserved. To bring Sevens Football to an international and national platform, various channels like social media, online platforms, national and international media etc can be used.

"We talk about academies, but let me ask you how many top-class footballers have these academies produced? Sevens have an endless number of top footballers. There was a time when Kerala didn't have a single football tournament (11-a-side). It was sevens which kept the game alive"- CK Vineeth, Former Indian International Player

Generally the Sevens tournaments are conducted from November to May. In Kerala, sevens football attracts more viewers than regular football matches. Earlier, it was played in paddy fields. In 1950s, national players who came for the national tournaments used to participate in the local sevens tournament for extra money. Sevens moved to enclosed grounds with ticketed entry by 1970s. As tournaments increased, the Kerala Sevens Football Association (KSFA) was formed in 1983. As of 2019, it has 32 registered clubs, and around 80 tournaments being held every year. Around 600 tournaments are held each season if unaffiliated clubs and unregistered tournaments are also counted. Sevens tournaments are also known for recruiting foreign players from Africa, mainly from Ghana, Ivory Coast, and Nigeria. Despite the popularity, the Kerala Football Association (KFA) refused to recognise sevens as legitimate football until 2017 and had even banned IM Vijayan once for playing sevens. Some of the International players who started their career in sevens are I. M. Vijayan, Jo Paul Ancheri, V. P. Sathyan, Anas Edathodika, and Ashique Kuruniyan.

Unique Features

1. A new, future format of Football
2. Unlike 5s this Football format is more close to the Classic football- 11 a side.
3. Small Ground, Less Players
4. The format is simple and fast.
5. Originated in Kerala, spread across the state of Kerala especially the northern part.
6. Most crowd puller game in Kerala
7. Almost 100 Major tournaments in Kerala with fully crowded galleries.
8. 3000-10000 spectators on an average
9. Temporary wooden galleries
10. Plays in mud and grass courts
11. Organic / Natural sporting
12. Rural sporting game- Most of the tournaments in rural areas
13. Strong presence of foreign players especially African players is a major attraction
14. There is a separate organisation for sevens championships (KSFA) but it is not yet approved by the Sports Council
15. Well defined rules and regulations.
16. Thousands of players, enough coaches, Referees, officials, organizers, Infrastructure providers engaged in Sevens championships
17. Sevens Football Championships are now being conducted in neighboring states of Tamilnadu, Karnataka and also in Middle Eastern countries where large population of Keralites exist.
18. If football is a religion then Sevens is a caste originated in Kerala, India.
19. Sevens is like 20-20 Cricket which has revolutionized Cricket.
20. Can be easily linked to Tourism, Fashion, Music, Film, Folklore, Culture, Entertainment etc.
21. Huge Growth potential in Kerala
22. A professional league was initiated a decade back

Sevens Premier League

1. Two championships were conducted in Kerala
2. Brand SPL- Indian Sevens Football Premier League
3. Strong Media support, Excellent PR
4. Thousands of Spectators
5. Football blended with 7 F's – Football, Food, Folklore, Fashion, Fusion, Fiction, Film
6. Entered in the prestigious Limca Book of Records as the Biggest Rural Football Championship
7. Selected as the best Football event in the state- Two consecutive times.
8. Established the property brand – 7's
9. Established the Event brand – Football Carnival
10. Also conducted – Corporate League, Women's League, Political League, Local Hero Cup, Kids Soccer challenge etc.

Road Map

1. Leagues in potential states – Goa, Kolkata, Tamil Nadu, Karnataka, Maharashtra, Mizoram etc.
2. Affiliation in FIFA, Approval of FIFA as a rural sporting Football format.
3. Approval of Olympic association, Indian Olympic association and similar bodies.
4. National level league in 3 years.
5. Asian Championship, Other continental Championships and World cup in future.
6. Branding as an Indian originated football format and positioning well in Global Football Market.
7. Attract world class players.
8. Contribute talented young players to 11s Football.
9. Establish 7s property brand
10. Explore the potential in Tourism, Culture etc
11. Establish a word organisation with the affiliation of FIFA
12. Energize India's growth in Football.
13. Develop an economy based on Sevens Football by promoting more championships and other related activities across the globe.
14. Add social connect elements with sevens
15. Evolve with professional format, well accepted rules etc. It shall be in line with the FIFA Football format.
16. Attract more spectators through Television Telecasts.
17. Organise continuous intellectual interaction of stake holding groups.
18. Develop professional Sevens football clubs and promote sevens clubs of existing regular clubs.

TRAINING AND COACHING - SEGMENT OVERVIEW

Coaching is very prominent sector in Sports. Major sports Giants are spending large amounts in Coaching, Academies, Trainers, Training etc. We have Sports academies in various levels and standards. SEPT, a sports initiative from Kozhikode is running about 60 Football academies in the State. LIFFA has more than 30 Soccer nurseries in Thiruvananthapuram district itself. Blasters started 5 plus soccer nurseries.

We have sports academies and training facilities in all major sporting avenues. A few among them are Govt funded. Many former players also come up with good academies. Usha School has excellent infrastructure and facilities. Many Schools have excellent training facilities and quality coaches. Even Though there is a lack in Trainers Training.

TRAINING AND COACHING - MICRO SEGMENTS

<i>Premium Academies</i>	<i>Medium Academies</i>	<i>Rural Academies</i>	<i>Sports Schools</i>
<i>Teachers Training</i>	<i>Coaches Training</i>	<i>Short term Trainings</i>	<i>Sports Science</i>
<i>School, College- General</i>	<i>School, College- Specialised</i>	<i>Sports Management Studies</i>	<i>Research</i>

TRAINING AND COACHING - POTENTIAL AREAS AND STRATEGIES

Potential Area- Training for Coaches

Concept- Developing good Coaches will transform the entire scenario

Model- Haryana, Punjab, NBA Basketball Clinics for Coaches

Advantage-

1. Lot of players and others selecting Coaching as full time career
2. Good live examples around us showing how good coaches make changes
3. Huge requirement for full time and part-time coaches
4. Requirement for Schools and Colleges for Physical education teachers- Govt and Private sector.

Requirement

1. A special mission with specific scheme, projects and programmes.
2. Continuous training, mentoring and monitoring facilities
3. Design special schemes for different sectors.
4. General training modules- Mental health, Psychology etc- Depending on external agencies
5. Technology practices, Management aspects
6. Associations should run special programmes
7. Physical Education teachers should get management, administration, and technology trainings
8. Standardisation, Ratings, Classification
9. Participation of Management experts, Psychology experts, Scientific Institutions, Training organisations
10. Avail services of internationally acclaimed organisations, academies and coaches
11. Collaborative efforts.

Potential Area- Sports Academies

Concept- Good Training in root level is essential

Model- MRF Foundation, Tata Football Academy, SEPT

Advantage-

1. Huge demand for coaching. It will increase day by day
2. Academies are running in average/ good standards

Requirement

1. Academies in different segments
2. Premium Academies like MRF Pace Foundation, Baichung Bhutia Academy, Tata Football Academy
3. Foreign collaboration
4. Attract private investments by bringing more corporates. Their CSR/ Social initiatives can be converted easily to Sports.
5. A special focus to be given in Investors Meet, Sports Conclave and in One to One meets for setting up Academies for root level development.
6. Strengthen the academies which have proven track record.
7. A participatory model to be worked out for strengthening academies in various levels. Develop a few models with the initiative of Govt.
8. SEPT, LIFA like academies require special focus and attention. Such excellent models shall be spotted out so as to make them Centres of Excellence.
9. The Mission to develop Centres of Excellence should be attached primarily with academies working independently or with Schools/ Colleges.

Potential Area- School, Colleges, Organisations- Part time Coaches in specialised areas.

Model- Baichung Bhutia School

Advantage-

1. Huge demand for coaching. It will increase day by day
2. Kerala is highly dense with Schools and Colleges
3. Schools, especially premium ones need specialised coaches

Requirement

1. Specialised Coaches
2. Some organisations with a pool of coaches and a system of delivery, training, skill development, process, network and credibility
3. Academies, Schools, Colleges to pay the organisation to avail service
4. Requirement of more such entities or platforms in Private sector.
5. Sports council/ Associations also can provide such facilities.
6. Some collaborative models can be formed first
7. Invite companies sporting areas/ startups to extend such services.

Potential Area- High Value Centers- Research, Science, Technology, Engineering, Management

Model- SMRI, Tvm

Advantage-

1. Kerala is always adopting new models
2. Institutions are interested in convergence and collaborations.
3. Kerala seeking for a leap and the support system is essential

Requirement

1. Collaborations
2. Participatory Models
3. Independent research centers with the adoption of Technology, Science, Engineering and Management.
4. Private entities especially startups to emerge.
5. Govt to support the running centres
6. Universities, Colleges to start such courses, Industry connect activities etc
7. Sports Schools Curriculum to be updated with these modern trends
8. Part time programmes to be added to equip the coaches, trainers and teachers.

Major Sectors- **Sports Management, Sports Science, Sports Engineering, Sports Media and Research.**

Sports is emerging as an important area in Economy. Health, Wellness, Fitness etc widen its branches with the inputs of Management, Science, Engineering, Marketing and Branding. It is assumed that the employment opportunities will emerge in these areas. Demand will increase for the trained professionals. The opportunities have no restrictions of borders. Larger economies create more job avenues. We require more specialised institutions in advanced Sports in both Private and Public sector. Management, Engineering and Research organisations shall be starting specialised courses linked with employers. Global opportunities are increasing year by year especially in the fast developing countries. Sports Companies, Professional Clubs, Associations, Media are major recruiters.

SPORTS EDUCATION & CAREER - *New Avenues & Opportunities*

Sports Management

1. *Sports Agent*
2. *Sports League Manager*
3. *Tournament Manager*
4. *Sports Club Manager*
5. *Sports Director*
6. *Sports Merchandiser*
7. *Sports PR Officer*
8. *Sports Accounts Manager*
9. *Sports Event Coordinator*
10. *Sports Facility Manager*
11. *Advertising Manager*
12. *Sports Development Officer*
13. *Sports Official*
14. *Professional Scout*
15. *Sports Analyst*
16. *Player Liaison Officer*
17. *Event Manager/ Coordinator*

Sports Media

1. *Broadcasting Engineer/ Technician*
2. *Sports Photographer/ Videographer*
3. *Sports Commentator*
4. *Sports Journalist*
5. *Sports Anchors/ Presenters*
6. *Video Editor*
7. *Online Editors*
8. *Graphic Designers*
9. *Virtual studio operator*

Sports Science

1. *Biomechanist*
2. *Sports Dietitian/ Nutritionist*
3. *Sports Therapist*
4. *Sports Psychologist*
5. *Sports Analyst*
6. *Sports Application Developers*
7. *Sports Programmers*
8. *Video Analyst*

Sports Engineering

1. *Materials Engineer*
2. *Manufacturing Systems Engineer*
3. *Industrial/ Product Designer*
4. *Motorsports Engineer*
5. *Equipment Manager/Engineer*
6. *Pitch/Ground Curator*



Potential Area- Global Career Openings, New trends in India, Kerala

Model- SMRI

Advantage-

1. Opportunities are increasing in advanced sporting across the globe
2. Sports Companies, Professional Clubs, Associations are recruiters
3. Kerala seeking for a leap and the support system is essential

Requirement

1. Advanced Courses in Private and Govt sector
2. Employment connectivity
3. Recruiting agencies with a global network
4. Services of ODEPEC like agencies
5. Grab higher studies avenues in foreign universities.
6. Universities, Colleges to start such courses, Industry connect activities etc

Potential Area- Education Abroad

Model- Australia, UK and US

Advantage-

1. Excellent Training in Core Sports
2. Global Exposure and Opportunities
3. Excellent centers in Sports allied sectors

Requirement

1. Awareness
2. Consulting Agencies
3. Government Agencies
4. Scholarships and Funding
5. Government Initiatives
6. Successful Case studies

CLUBS - SEGMENT OVERVIEW

The clubs both Professional and Ametuer have a crucial role in the development of Sports. We have a shortfall in departmental clubs which had been very strong earlier. Kerala Police, KSRTC, Titanium, FACT etc managed well equipped clubs in different sporting items. Now KSEB has good clubs in women's Volleyball and women's Basketball. They have contributed excellent international players in the last decade. We don't have enough professional clubs while considering the potential of the state. Blasters, Gokulam FC etc are exemptions. Gokulam manages both Men and Women teams.

CLUBS - MICRO SEGMENTS

<i>Professional</i>	<i>Ametuer</i>	<i>School, College</i>
<i>Departmental</i>	<i>Institution, Organisation</i>	<i>Recreational</i>

(Clubs in different discipline of sports shall be considered from Football to Athletics)

CLUBS - POTENTIAL AREAS AND STRATEGIES

Potential Area- Professional Clubs, Departmental

Model- KSEB, Gokulam FCI

Advantage-

1. Infrastructure and Events get momentum
2. Big fan base for different sporting items
3. Presence of large Corporates and Banks which originated in Kerala

Requirement

1. More professional clubs of Corporates or Large organisations
2. Departmental and PSU Clubs- require a revamp
3. Cooperative Sector to be involved with own clubs
4. Banks, IT Companies also have the potential to initiate and manage professional clubs
5. A special focus to be given in Conclaves, Investment Meets for developing professional clubs.
6. One to one meetings to attract more institutions to setup the Clubs
7. Perfect documentation including Business model, Revenue proposition, Branding, and Marketing has to be done along with the inputs from management experts. It shall definitely include the much advantageous part for corporates; the branding/ advertising.
8. Promote collaborations of Management, Technology, Engineering, Science and Research agencies to get the real benefit of advancement in the sector.
9. Different formats/ Models like Fans promoted clubs, which is a successful model in the western world.
10. Govt to develop a mechanism to keep the ecosystem healthy and to attract new entrants.
11. Associations too shall take initiatives for the same.

SPORTS MEDICINE - SEGMENT OVERVIEW

As sporting activities increase, need for support systems such as Medicine, Healthcare etc will also increase. Kerala has good healthcare infrastructure basically and only a few additions are needed to set up sports medicine departments in the hospitals. Few hospitals have already started specialised centers of Sports Medicine to grab the opportunities. Ayurveda has immense potential in this sector. It's truly untapped. Ayurveda can provide exclusive treatment procedures and excellent wellness solutions. Naturopathy also has similar features with extended unique services.

SPORTS MEDICINE- MICRO SEGMENTS

Specialised Hospitals
Yoga

Ayurveda
Naturopathy

General Hospitals

SPORTS MEDICINE - POTENTIAL AREAS AND STRATEGIES

Potential Area- Modern Medicine/ Hospital

Model- Medical Trust

Advantage-

1. The state has strong healthcare infrastructure.
2. Excellent hospitals in private sector
3. Kerala is promoting Medical Tourism
4. We can provide quality healthcare at very low cost.

Requirement

1. Specialised Centers in Sports Medicine
2. Proper promotion- Individual and combined
3. Efforts to build Kerala as a hub or destination of Sports medicine
4. Need to attract patients from Outside Kerala especially from other countries.
5. A mechanism is needed for networking and promotions.

Potential Area- Ayurveda, Yoga, Naturopathy

Model- Yet to evolve

Advantage-

1. Kerala, the birthplace of Ayurveda, Long heritage, Excellent centers and Doctors.

Ayurveda, a perfect alternative to many sports related injuries and health issues

Ayurveda complement the modern medicine effectively in Sports related health issues.

Ayurveda is quite unique for Kerala

Naturopathy is effective in certain cases and a complementary medication

Yoga also could be leveraged as complement

Requirement

1. Sports Medicine focused special centers in Ayurveda
2. Good promotion is needed to grab the potential outside Kerala.
3. A Special purpose vehicle to tap the potential- Developing Centers, Equip the Centers to match the requirement, Coordinating promotions.
4. Standardisation in procedures and to develop a protocol for treatment.
5. Systemisation and Documentation
6. Develop success stories and case studies

FANTASY GAMES - SEGMENT OVERVIEW

The Central Government has developed a framework and guideline for Fantasy Games. It is expected to have a rapid growth in the segment. Youngsters and Kids are engaged more with Fantasy Games. Online Fantasy Games have become more common in the last 2 decades and surprisingly it has secured top gear in India. Just by creating your own imaginary team, you could earn some real money!

Dream 11, Halaplay, MPL- Mobile Premier League, Cricplay, Fanfight, 11 Wickets.com, Zapak, BalleBaazi, MyTeam11 and Rummy Circle are the major games in India. Kerala has not a big role in the Gaming business, but the consumption is huge. Youngsters are getting substantial amount while playing this crazy games online. Further huge growth is expected in this sector in near future.

FANTASY GAMES - MICRO SEGMENTS

Platforms

Applications

Development

Consumption

FANTASY GAMES - POTENTIAL AREAS AND STRATEGIES

Potential Area- Application Development, Consumption

Model- Has to evolve

Advantage-

1. Huge Consumption
2. IT/ Technology manpower, Good startups and Companies, Ecosystem

Requirement

1. More Platforms
2. Startups to tap the potential

SPORTS MEDIA - SEGMENT OVERVIEW

Basically, sports has become a media product now. The events have become Screen products. It was the Television which revolutionised sporting industry. Now the digital space has increased this intensity. Statistics shows the spectators of popular sporting items through Television Channels are 100 times more than those watching in Stadium. The Major chunk of the revenue of any sporting event comes from the Television rights. The Channels are generating revenue from Advertisements and Subscription charges. When compared with the revenue from the Ticket sales we can see a huge difference. Now the organisers are selling digital rights too and generate big revenue. We can even say, 'now the games are being played not in the ground, but on the screen'. Sports Telecasting industry itself is big in size. Channels now started providing content in local languages too. The consumption of Sports content in Kerala is very high and far ahead of National average. News Papers also have at least a dedicated page for sports. Sports magazines are best sellers even now. The media is a great employment generator in Sports especially the Television. The requirement for Creative and Technical people is also increasing.

MEDIA - MICRO SEGMENTS

TV Broadcast
Freelancing

Print Media
Technology- VR, AR

Digital & Social Media
Film

MEDIA - POTENTIAL AREAS AND STRATEGIES

Potential Area- More Screen Products, Digital Delivery, Employment

Model- China

Advantage-

1. Huge Consumption of TV, Print and Digital content
2. Large followers for Football leagues, IPL, World Cups and major sporting events.

Requirement

1. More sporting events are to be converted to screen products
2. Regional Language versions attract more enthusiasts.
3. Local events to be streamed through digital, social media platforms
4. Search the possibilities of TV tie ups, Streaming.
5. More employment generation in specialised areas.
6. Network or consortium of Local Media, Journalists and Media professionals.
7. Linkage with National and International sports networks.

STARTUPS - SEGMENT OVERVIEW

The participation of new entrepreneurs, ventures and startups are essential for the development of any industry. The sports startup ecosystem is in the budding stage in India. In Bangalore lot of startups are emerging in multiple streams of Sports. Fantasy sports initiatives have become super startups. Sports Infrastructure, Facilitation, Training, Networking, Media, Digital transformation, Science, Equipment, Online sales etc are most prominent areas with huge potential for growth.

Its high time to develop a startup ecosystem for further growth of the Sports Economy. There are good chances for developing great startups in sports sector.

STARTUPS - MICRO SEGMENTS

<i>Ventures</i>	<i>Employment</i>
<i>Events, Avenues</i>	<i>Leisure Sports</i>

MEDIA - POTENTIAL AREAS AND STRATEGIES

Potential Area- Technology, Analysis, Networking, Applications, Enterprises, Clubs, Academies, Coaching facilities

Model- Bangalore

Advantage-

1. A Startup culture is nurturing.
2. Kerala, the first state to initiate Startup Village, Incubator etc
3. Sports is emerging as an Industry as well as an Economy

Requirement

1. More Enterprises and specific startups
2. Ventures needed in all segments of Sports
3. Huge gap in Technology/Science integration
4. Collaboration and hand in hand approach with State Startup Mission.
5. A defined process to mould startups and an ecosystem in organic way.
6. Special focus and mechanism needed
7. A mega hackathon every year
8. Small events to engage startups
9. Fund raising mechanism

CASE STUDIES

a. Startup India

Indian startups have raised \$42 billion in 2021, up from \$11.5 billion in the previous year. India saw 46 unicorns (companies with \$1 billion valuations) in 2021 alone, more than doubling the total number of unicorns to 90. These include ShareChat, Cred, Meesho, Nazara, Moglix, MPL, Grofers (now Blinkit), upGrad, Mamaearth, GlobalBees, Acko, Spinny and others. India - with 90 unicorns - is the third-largest unicorn hub behind the US (487) and China (301), and ahead of the UK (39). India has the third-largest startup ecosystem in the world with about 60,000 startups.

These startups are not only developing innovative solutions and technologies but are generating large-scale employment. Today, one out of 13 unicorns globally is born in India. Bengaluru is the Indian city with the most unicorns. Fintech, e-commerce and SaaS (software as a service) have seen the maximum number of unicorns, while health-tech, ed-tech, D2C, Gaming and Crypto are also close behind.

Flipkart was the most valuable unicorn (\$37.6 billion after raising \$3.6 billion in July 2021), while Mensa Brands was the fastest to turn into unicorn (took only 6 months to turn unicorn in November 2021 round after raising the first round \$50 million in May 2021)

India has seen four decacorns (companies with a valuation of USD 10 billion and above) so far - Flipkart, Paytm, Byju's and Oyo Rooms. 2021 was a landmark year for Indian startups going public. Further, Zomato has the highest market capitalisation (\$14.8 billion), among the listed Indian startups, followed by Nykaa (\$13.5 billion) and Freshworks (\$6.9 billion).

20% of unicorn founders are non-engineers, two-thirds of the Indian unicorns have at least one or more founders from IITs, IIMs or ISB. There are 13 female unicorn founders, out of which 8 have emerged in the year 2021 - Falguni Nayar (Nykaa), Gazal Kalra (Rivigo), Ruchi Kalra (Of Business), Divya Gokulnath (Byju's), Ghazal Alagh (MamaEarth) and Saritha Katikaneni (Zenoti), among others.

2021 was not just about startups entering unicorn clubs and making public forays, but also about innovative companies emerging from smaller towns.

The last few months have not only highlighted innovation coming from tier 2,3,4 towns of India but have also shown that states like **Rajasthan, Utrakhand, Madhya Pradesh, Gujarat, Kerala, Bihar, Jharkhand, and Odisha** are becoming hotspots for entrepreneurship.

Case Studies - Sports Startups

Many entrepreneurs are coming up with new businesses ranging from retailing sports apparel to providing analytics to improve performance. Sports is one of the biggest industries in India. In 2013, it was reported that the Sports Goods market was \$2 Billion in India. Hence, it is clear that this market has a lot of potentials. Moreover, Sports startups promote health and passion. Here are a few sports startups in India that are evolving along with the growth in Sports industry. Sports is a very important part of India. It is not only an activity, entertainment or about health, it's about emotions. Each Indian love to watch at least one sport. Also, during critical matches, it brings families and society together.

Successful Sports Startups in India

SportsApp

SportsApp is a leading sports startup in India that was founded by Shashank Mishra and Himanshu Nain in 2018. It is an aggregated platform built to provide ease for one to connect with another. Here they can follow one another, share relevant thoughts, get updates about upcoming events, sports job positions, apply for sponsorships, etc. All of the team members at SportsApp have played sports at different levels and have experienced the pain that experienced by most of the players currently. So, the main idea behind this sports startup is to bind everyone together so that they can make this nation a good sporting nation by organizing this sector.

Sports365

Sports365 is a Bangalore-based startup founded by Chandra Sekhar Reddy and Aashutosh Chaudhari in 2011. This is one of the first professional sports companies in India that cater to the sports and fitness sector with their one-stop solution for users' sporting requirements of both individuals and institution

They sell a wide range of sports products like sports and fitness equipment, apparel and accessories of leading national and international sports brands. They also provide services for events, infrastructure development, and consulting and merchandising as well to schools and colleges, corporates, clubs and real estate. Sports365 raised a total funding of \$1 million from investors such as Zolon Ventures and Powerhouse Ventures among others. The startup has also announced Yuvraj Singh and Lara Dutta as its sports

ambassadors and owns as well as operates online portals like sports365.in, tennishub.in, and badmintonhub.in.

Protege Sports

Protégé Sports is a sports-tech startup founded by Pranesh Krishnamurthy, Rohit Narayan and Rahul Rane in 2014. They aim to bring sports technology to all. Protégé Sports supplies wearable technology for team sports like hockey and football that helps track players' performance on the field. This helps clubs and coaches to set a benchmark for the players and manage training and trial sessions accordingly.

The startup also provides SAAS i.e. Software as a Service tool such as software licenses to use its academy or club management tools, training modules and communication modules among others. They also offer tournament management services, along with ticketing and merchandising services.

Live Your Sport

Live Your Sport (Azani) is Bengaluru-based online sports goods and fitness equipment store founded in 2012 by Siddharth Suchde. The startup provides an online store for sports and fitness enthusiasts where one can find quality equipment and accessories. It uses thirteen technology products and services including Google Analytics, G Suite and reCAPTCHA among others. They also offer helpful insights into various aspects related to sports and fitness like health, diet, injury, recovery, and more.

The online platform provides a sports and fitness-oriented services centre that strives to make the users' sports and fitness journey easy, comprehensive access and hassle-free services. It lets the users browse through 20,000 sports and fitness equipment ranging from over 30 sports and various workout modules. They also provide information on workouts, training, diets and more on their blogs.

SportzVillage

SportzVillage is a Bangalore-based sports startup founded in 2003 by Jitendra Joshi and Saumil Majmudar. It is one of the oldest Indian sports startups and a leading provider of sports education and management to schools and corporates. The startup offers sports marketing, ticketing, and infrastructure services, SportzConsult and EduSports being two of its subsidiaries.

The startup has built an ecosystem of relationships across federations, media, brands and sponsors through its subsidiaries. SportzVillage capitalizes on emerging sports and health & fitness-related markets in India. They have a presence in five cities across India and raised total funding of \$10 million.

Rooter

Rooter is a Delhi-based social network for sports enthusiasts that connects people with similar interests in sports. The app was founded by Piyush Kumar in 2016. It allows users to predict scores and events with friends during the live game.

The startup assigns a passion score to each of its users and the passion score is generated by an algorithm that crawls the user's social media activity and engagement with the app. The users can also connect to other enthusiasts based on passion score and distance. Their app is available on both iOS and Android platforms.

Dream11

Dream11 is a Mumbai-based online platform founded in 2009 by Bhavit Sheth and Harsh Jain. The startup is an official partner of BCCI's IPL used for playing real-time fantasy cricket and football leagues.

The startup started with cricket first and then launched football fantasy leagues as well in the year 2014. The users can form leagues and invite friends to play and compete for scores. The startup raised total funding of \$100 million from investors such as Tencent, Kalaari Capital and Multiples Equity among others.

BookMySports

BookMySports is a digital sports platform founded by Sanjeev Sinha that is a handy interface between the public and their access to avail sports facilities covering major sports such as cricket, football, tennis, basketball and more. The platform lets users book sports facilities or create their own sports tournaments online within a matter of minutes. They aim at increasing the capacity utilization of sports facilities across cities by connecting sports enthusiasts to them through their online platform.

The startup has a wide range of products tapping the entire value chain spanning across the sports ecosystem. It enables the users to drive benefits from better management of demand and supply, introducing operational efficiencies and transparency in pricing and service delivery for users. They are currently present across six cities in India.

KOOH Sports

KOOH Sports is founded by Prabhu Srinivasan & Susir Kumar in 2010. KOOH Sports is headquartered in Mumbai. It is an international sports startup that provides sports education, training, and technology.

KOOH Sports was founded to develop sporting habits in children in order to promote a healthy lifestyle. It organizes grass root sports programs at schools to generate interest in sports among children. Its sports development centres are dedicated to nurturing and promoting sporting talents.

KOOH Sports is backed by private equity fund Faering Capital, Tata Consultancy Services (TCS), HDFC Ltd and sports promotion service Elevate Sports. Existing investors together hold a 70% stake in the company and the rest is with promoters.

NUTRITION & WELLNESS - SEGMENT OVERVIEW

(Essential to define and decide the border with Health Sector, Ayush etc. Also needed to specify the scope of Wellness in Sports Sector.)

The wellness industry represents 5.3 percent of global economic output. Among the 10 wellness markets analyzed, revenue growth leaders from 2015–2017 (per annum) were the spa industry (9.8 percent), wellness tourism (6.5 percent) and wellness real estate (6.4 percent).

The global wellness economy is currently valued at \$4.5 trillion (2018 data). Wellness expenditures (\$4.5 trillion) are more than half as large as total global health expenditures (\$7.8 trillion, based on WHO data). The industry grew by 6.4 percent annually from 2015–2017, from a \$3.7 trillion to a \$4.2 trillion market, nearly twice as fast as global economic growth (3.6 percent annually, based on IMF data). The wellness industry in India is also growing in similar pace. Kerala is a huge market for wellness products and services. Direct selling is one of the major beneficiaries in this sector in Kerala.

NUTRITION & WELLNESS - MICRO SEGMENTS

<i>Manufacturing</i>	<i>Retailing</i>	<i>Online Sales & Delivery</i>
<i>Researches</i>	<i>Wellness Centers</i>	<i>Technology Platforms</i>
<i>Employment</i>	<i>Direct Selling</i>	<i>Ayurveda Wellness</i>

NUTRITION & WELLNESS - POTENTIAL AREAS AND STRATEGIES

Potential Area- Wellness through Ayurveda, Naturopathy, Yoga and allied areas of Ayush

Model- Sri Lanka

Advantage-

1. Kerala, The birthplace of Ayurveda.
2. Well defined procedures, products, methods in wellness based Ayurveda treatment
3. Wellness could be integrated with Yoga and Naturopathy

Requirement

1. Quality Centers
2. Excellent promotion- Special focus needed
3. Standardisation, Rating, Certification
4. Documentation
5. Segmentation
6. Technology Advancements
7. Integration with allied areas- Yoga
8. More institutions into the business
9. New concepts and ideas, Innovation
10. Funding for new ventures
11. Fund raising mechanism
12. A proper network of Service providers
13. Training & Mentoring for the Ayurveda- Wellness entrepreneurs.
14. Invite Startups- Potential for new ventures.

Potential Area- Nutrition Products- Manufacturing, Retailing, Direct Selling, Online Sales, Researches

Model- open

Advantage-

1. High level of consumption
2. Post covid scenario- Concern over health and immunity
3. Sales potential; Generate employment direct/ indirect

Requirement

1. Proper Researches
2. Quality assurance of products
3. Certification
4. Manufacturing Procedures
5. Regularisation, Streamlining
6. Industry Meets, Cluster/ Segment meetups
7. Skill development of entrepreneurs in the segment
8. Ensure startup engagements
9. Innovations, New Ideas, Products
10. Maximum utilisation of online marketing potential
11. Increase the credibility
12. Promote Manufacturing, Exports and Online sales
13. Focus on better employment generation from manufacturing to sales

HIGH VALUE SPORTS - SEGMENT OVERVIEW

We have 4 well equipped Golf Courses in the State. The CIAL Golf course membership was oversubscribed when it opened in the beginning. It's a clear indication that more people are interested in high value sports like Golf, Billiards, Snooker, Squash etc. These all are not just play stations, but multilevel premium entertainment centers. The increasing number of upper middle class population and their aspirations & lifestyle is a booster to such high value games.

HIGH VALUE SPORTS - MICRO SEGMENTS

Infrastructure

Events

Training

Employment

HIGH VALUE SPORTS - POTENTIAL AREAS AND STRATEGIES

Potential Area- Golf, Billiards, Snooker, Squash etc

Model- CIAL Golf Club

Advantage-

1. Increasing aspirations of middle class/ upper middle class
2. Interests of youngsters, new generation.
3. People are ready to avail services by do paying.

Requirement

1. Golf clubs to set up with the airports, seaports and huge infraprojects
2. Membership packages for Golf courses is a workable model
3. Need more facilities for Billiards, Squash etc.
4. Promote specific ventures in the segment.
5. Add-on refreshment/entertainment facilities with sporting addons
6. Need specific coaching facilities for the new generation sports

ADVENTURE SPORTS - SEGMENT OVERVIEW

While some people have fun playing cards or shopping, other people have fun jumping off cliffs, climbing up mountains and surfing over roaring waves. These extreme sports enthusiasts take on nature's most menacing qualities, hoping to survive and conquer. Although the definition of "adventure sports" explains the general characteristics of the activity, it also does a little to express the adrenaline, danger and thrill associated with extreme sports.

ADVENTURE SPORTS - MICRO SEGMENTS

<i>Trekking.</i>	<i>Caving</i>	<i>Parasailing</i>	<i>Scuba Diving</i>
<i>Flyboarding.</i>	<i>Skydiving.</i>	<i>Flying Fox</i>	<i>Mountain Biking</i>
<i>Rock Climbing.</i>	<i>Bungee Jumping</i>	<i>Paragliding</i>	

ADVENTURE SPORTS - POTENTIAL AREAS AND STRATEGIES

Potential Area- Trekking to Scuba diving

Model- Nil

Advantage-

1. Vibrant and enthusiastic youngsters
2. Aspirations for experiments
3. Geographical pattern of the state- Different terrains suitable for multiple adventure sports.

Requirement

1. Events, Coaching
2. Clubs/ Communities
3. Organisers
4. Attachment with any associations
5. Promotions, PR
6. Standardisation, Safety measures, Professional protocol.
7. Connectivity with National/ International bodies

NON CONVENTIONAL SPORTS - SEGMENT OVERVIEW

This sector includes certain international sports which are very famous like drone racing, car racing etc. The cash flow is huge.

NON CONVENTIONAL SPORTS - MICRO SEGMENTS

<i>Kite Flying</i>	<i>Drone Racing</i>	<i>Byke Race</i>	<i>Car Race</i>
<i>Mud Races</i>	<i>Futsal</i>	<i>3x3 Basketball</i>	<i>Water Rafting</i>
<i>Beach Volleyball & Beach Football</i>			

NON CONVENTIONAL SPORTS - POTENTIAL AREAS AND STRATEGIES

Potential Area- Trekking to Scuba diving

Model- T20 Cricket

Advantage-

1. Vibrant and enthusiastic youngsters
2. Exploring the nature
3. Welcoming attitude towards new ideas
4. Beach Volley has become an olympic event, Futsal has won FIFA approval for its world cup championship.

Requirement

1. Association attachments
2. Network with National, International bodies
3. Organisers, Events
4. Promotions, PR
5. Standardisation, Legal framework, Protocol.
6. Connectivity with National/ International bodies
7. Focus on most potential items and concentrate only on those
8. Explore recreational/ entertainment/ Leisure aspects too.

SCHOOL & COLLEGE SPORTS - SEGMENT OVERVIEW

This sector includes certain sports which integrate both sports and education to encourage young sports enthusiasts.

SCHOOL & COLLEGE SPORTS - MICRO SEGMENTS

University Physical Education- General

University Physical Education-Special

School Physical Education- General

School Physical Education- CBSE

School Physical Education- Sports Schools

SCHOOL & COLLEGE SPORTS - POTENTIAL AREAS AND STRATEGIES

Potential Area- Physical education to athletic meets

Model- Nil

Advantage-

1. A wide canvas
2. Large number of Schools and Colleges
3. Both Govt. and private sectors are strong.
4. School Athletic meet is one among Asia's biggest sporting events.

Requirement

1. Participatory model
2. Facilities to be shared with public on a payment basis
3. Better Infrastructure
4. Specialisation required in suitable 1-2 items by each institution
5. General, Specialised, Sports Schools etc to be considered with equal priority
6. Include CBSE, Other Syllabus schools; Self Financing and Professional Colleges too in the segment.
7. School/ College leagues shall be treated with more professional aspects
8. Awards, Recognitions, Grading
9. A policy framework specially for School, College Sports
10. Sustainable finance model/ mechanism
11. Working capital for proper functioning

SPORTS OPERATION

Sports operations including logistics, labour, Management, Administration is a sizable area in Sports economy. It's essential in managing sports infrastructure, Events, Academies, Clubs, Equipment manufacturing and so on. As Sports economy is emerging the operations will naturally improve. It will generate more employment and enterprises. Sports operations can be considered as an integral part of Sports Management.

SPORTS OPERATION- MICRO SEGMENTS

Logistics

Labour

Management

Administrative

Recreation

ALLIED SERVICES - COMPLEMENTARY SECTORS

Even though it's allied/ complementary services sector, it's a big economic activity. The major role of this sector primarily comes along with events. The ISL matches can be considered as a case study. A single match

benefits Restaurants, Hotels, Taxi, Auto, Traders and so on. Temporary/ Street vendors also get benefitted.

It's essential to create more Leagues, National and International Events to develop the economy. Also it's essential to scale up the local and indigenous sporting events by connecting them with Tourism.

SCHOOL & COLLEGE SPORTS - MICRO SEGMENTS

Stay, Accommodation

Food- Restaurants

Travel

Trade

SPORTS TECHNOLOGY & SCIENCE

Sports is science at all now. Developed countries manage sports with most modern technologies, analytic tools and applications. It's the reason behind their massive growth and achievements in Olympics and in World championships. It's essential in Skill development, team buildup and so on. India's tech hub Bangalore is running far ahead in sports with the support of Technology. Lot of companies are engaged in creating tech solutions specifically for sports operations. Sporting Institutions are now focusing more on researches. In Kerala, the Sports technology and Science is in budding stage. We need more focus and attention in this direction. Psychology and related training has a critical role in moulding talent and achieving peak performance levels.

SPORTS TECHNOLOGY & SCIENCE - MICRO SEGMENTS

High Value Equipments

Researches

Visual Analysis

Analytical Programming

Applications

Psychology and Mental Health

SPORTS TOURISM

When the indigenous sporting items and events become professional there will be an opportunity to tap the potential of Tourism. For example, the boat race has proved its strength of attracting foreign and domestic Tourists.

Sevens also has the similar potential as it was originated and rooted in Kerala. The procedures and the event flow is absolutely local flavoured. But we haven't properly marketed it yet. Tug of War is also very popular and has a potential for the tourism related growth.

SPORTS TOURISM

Events

Avenues

Archives

Ayurveda

Watersports

SPORTS BRANDING & MARKETING

Sports marketing is in premature stage even now in our state. Corporates are getting more interested in Sports branding. Kerala is a consumer state and large companies especially the FMCG manufacturers focus on Kerala Market carefully. Keralites are generally sports enthusiasts and sports branding is one of the most appropriate channel to influence the consumers. But Sports associations and Sports organisers are not utilizing this opportunity. Sports celebrity management is also very weak in Kerala. Developing Leagues, Conducting events, Building up professional Clubs, Creating Screen & digital products, Moulding Sports management professionals etc are crucial for sports marketing.

SPORTS BRANDING & MARKETING

Branding

Advertising

Celebrity Management

Event Marketing

Sports Talent Management

PUBLIC AMENITIES

We need public sports, fitness and wellness facilities. Morning and evening walks are now common but enough walkways are not available. It's unsafe to use roads for walking. Accidents are common. It's essential to develop smart walkways in the cities and in the rural areas.

Kids and youngsters have shortage of public playgrounds. Local bodies have to develop playgrounds by utilising the vacant space. The public gym developed along with the walkway at Kochi marine drive is a successful model. Also Metro Kochi is facilitating and promoting Cycling through a special scheme.

PUBLIC AMENITIES - MICRO SEGMENTS

Walkways

Open Gymnasiums

Cycle tracks

Open Public playgrounds

SPORTS SERVICES

Service sector in Sports Industry is connected directly with Events, Infrastructure, Training etc. The elements in the service sector ranges from printing to digital display. Basically it's closely related with large or medium scale events. Even though it is scattered its substantially a big economic activity while compiling all sports facilitation services.

Building temporary galleries and other facilities for Sevens, Boat League, Tug of War is a vast area in the service sector.

SPORTS SERVICES - MICRO SEGMENTS

Printing

Lights, Sound

Turfs

Signages

Display Boards

- ❑ The whole activities under the definition of Physical, Sporting, Fitness and Wellness with its allied, complementary and supplementary areas contributed a sum of **Rs. 8560.85 Crores** towards Kerala GSP in 2020-21. This arrives through a basic research done by using the secondary data available.
- ❑ The annual GSP of the state is **₹ 9.78 lakh crore** in 2020-2021.
- ❑ The contribution of Sports and related sectors comes nearly **1% (0.875%)**. This comes with the normal and routine activities.
- ❑ This is evolved with a basic study which was completed with the secondary data on a conservative approach.
- ❑ There is huge potential to grow the segment with targeted Schemes, Projects and Programmes. Can expect a contribution of **3-4% in 5 years** with a massive drive in the sector. An overall economic activity for **Rs. 40,000 Crores** per year also projected by 4 Years.
- ❑ When Economy grows more employment opportunities will be generated domestically through Sports Operations, Events, Education, Marketing, Venues, Coaching etc. Indirect job opportunities in Construction, Media, Facilitations also will increase.
- ❑ And also target to generate employment opportunities of 1 Lakh directly or indirectly in the domestic market itself in 4 years. And also to see the possibilities to export the skilled personnel from Sporting talents to Coaching and Officials to Management professionals. The target is 5000 per year in 4 years.

Revenue Streams

Sporting	Rental	Investments
Recreation	Membership	Sponsorship
Branding	Contributions	Remuneration
Ticket Sales	Consumption	Govt Grants
Investments	Services	Sales

India is such a big country and the population comprises to 130 Cr plus; one fifth of the total population of the world. The youth is the country's majority and the aspiration of the youngsters is a striking phenomenon. In India, Cricket is a part of Nationality and Civic pride. No other major sports is there to satisfy the aspirations of 1.3 billion Indians.

How BCCI Leads the way?

Just three decades earlier in 1993, Doordarshan, the government-run television network, had a monopoly on the telecast of cricket matches in India and it used to force BCCI to pay for every telecast. For each live telecast, it used to demand `5 lacs from the BCCI to meet production cost. The scenario changed in 1993 when the board sold television rights for the India-England series to Trans World International. Doordarshan, in turn, was forced to pay TWI \$1 million for the right to telecast the matches in India. This agreement, the first of its kind in the Board's history, made it richer by \$600,000. It also allowed the BCCI to tide over the severe financial crisis plaguing Indian cricket between 1987 and 1992. Countries like US and UK had already entered this broadcasting system and was making profit from it. India entered the field late but has clearly caught up.

When it comes to IPL, the success is more significant. Two things, it can be argued, has helped the IPL in doing so. First, it's risk free. In the IPL, India wins every single day. Whichever team plays, India is the winner.

The second is the ever growing Indian diaspora across the world. With more and more Indians making the US, the UK and Europe home, takers for the IPL across these consumer markets have consistently risen. The IPL for many is a way to connect to the Indian roots.

This IPL thing turns out to be a perfect shot by BCCI. A brand that has lost sheen in the last few years and repeatedly pulled up for inaction by the Supreme Court, is still capable of inspiring corporate confidence and bids to the tune of Rs 15,000-plus crores for a domestic cricket property. In 1983, when BCCI wanted to congratulate the Indian team for winning the World Cup, they were so strapped for cash that they had to organize a Lata Mangeshkar musical to do so. Today, around three decades later, it is the world's richest cricket governing body and is worth an astonishing Rs 14,489 crores. To understand why, let's have a look at their business model:

First things first - Indian Premier League.

In the year 2018, BCCI earned around 4000 crore, and not surprisingly, half of it came from the 2018 IPL. And we all know that; IPL is a treasure trove in itself. IPL's value has been growing exponentially. From being valued at \$3.2 billion in 2014, it went up to being valued at \$6.8 billion dollars in 2019!. Now, the second biggest source of revenue for BCCI is the media rights of the Indian cricket team. Which earned them 828 crore in 2018-19. But this hadn't always been the case until 1993. BCCI's broadcast rights holder, STAR India, pays Rs 43.20 crore per international match played in India. It also owns the IPL media rights made with a historic bid of Rs.16,347.50 crore for five years (2019-2022), meaning BCCI gets Rs.54.50 crore per match!

Craze for Cricket in India

BCCI's real success comes from the success of cricket itself. India is the biggest television market for cricket and almost 75% of the game's viewership comes from here. This means that other nations are clamouring to play matches with India, earning them a huge chunk of the revenue from bilateral series. Because of India's share in the cricket market, BCCI also receives the largest share of ICC's revenue. In 2020, India had a 26% share in the ICC income, earning around \$405 million while ECB received \$139 million as the second highest earner.

Finally, ever thriving - Sponsorship deals

BCCI invites bids for their various sponsorships, from Team Kits and broadcasters to Team Sponsors and Title Sponsors. The rules for the auction procedure are constantly changing, to ensure maximum profits. Currently they enjoy seven sponsors - STAR Sports(broadcaster), Byju's (team sponsor), Paytm (title sponsor), Dream11, Hyundai, and Ambuja Cement (partners), and kit sponsor (MPL Sports). To sum it up, more than half of the revenues for BCCI in any particular year comes from IPL.

The basic factors

India is such a big country and the population comprises to 130 Cr plus; one fifth of the total population of the world. The youth is the country's majority and the aspiration of the youngsters is a striking phenomenon. In India, Cricket is a part of Nationality and Civic pride. No other major sports is there to satisfy the aspirations of 1.3 billion Indians. The Indians are settled all across the globe and Cricket is a factor that unites Indians. As a market of 1.3 billion people, the brands consider cricket as the best medium to reach all Indians irrespective of caste, colour, gender and age. The Cricket and the Board generate such a big income on this basic backdrop of sociological factors.

AN EYE OPENER TO ALL SPORTS

FIFA considered India as a lucrative future market for Football. There is enough potential for Football to grow in India like Cricket and even more than that. The huge consumer market itself is the real potential. Cricket generate maximum revenue through its telecast rights. The telecasters are getting revenue from the advertisements. These advertisements are of the major consumer brands. They understand that Cricket is the best way to reach to mass. When the round completes, we can assume that the base is the power of consumption and the purchase parity of the people. India is such a huge consumer market to cater any type of sports generally accepted by the mass. BCCI tapped the potential with its maximum levels. The opportunities are still there for any sports especially team sports whether it is Football, Volleyball, Hockey or Kabaddi. The Pro Kabaddi League is a huge success and generates good revenue and is a classical example for the potential to grow.

PLANS & SCHEMES

Sports Economy Mission is conceptualised to act as a catalyst on the economic growth in Sports. All the Plans, Projects and Schemes are conceived on this perspective. Here the process tried to quantify even the non economic outcome of Sports such as the impact on health and more. Other major focus is on the employment generation and its valuation on each segments and projects.

Schemes in Kerala are launched by the government to address the social and economic welfare of the citizens of this nation. These schemes play a crucial role in solving many socio-economic problems that beset Indian society. These schemes are structured based on certain plans, projections and trials. So in this section we are highlighting certain suggested plans that lead to schemes. It has been evolved through a long process where detailed researches, studies, analysis, insights, experts inputs, assumptions are involved.

SPORTS GOVERNANCE - *Sports Council & Associations*

Sports Directorate and Sports Council are Government funded and associations are getting grants from their corresponding National Associations. Government is spending huge amount every year to manage the

infrastructure and facilities. Kerala Cricket Association is getting huge funds from the cash rich BCCI and they are building good Stadiums, Academies, Training facilities etc. They are also conducting tournaments. All other associations are heavily dependent on Sports council grants. Kerala Football Association has long term tie ups with corporates. Other associations are running on shortage of funds. They are not even trying to become self-sustained. Its high time to equip Associations to run independently without govt grants.

SPORTS COUNCIL & ASSOCIATIONS

<i>Sports Directorate</i>	<i>State Sports Council</i>	<i>Kerala Sports Foundation</i>
<i>District Sports Councils</i>	<i>Sports Council at Panchayath</i>	<i>Kerala Cricket Association</i>
<i>Kerala Football Association</i>	<i>Other State Level Associations</i>	<i>District Level Associations</i>

REVAMP PLAN - SPORTS ASSOCIATIONS

Associations to be revamped with ultimate professionalism and Self sustainability

Model- BCCI

Advantage-

1. Associations for all major sporting events
2. Few of them have professional leadership
3. An environment to excel is possible
4. Huge public support

Requirement

1. Structural change and a new working model
2. A defined Business model like BCCI
3. Each association should have self sufficiency
4. Associations should have proper roadmap- A model to be chalked out.
5. A revamp is needed from district levels
6. Long term commercial tie ups
7. Corporate involvement
8. Continuous skill development and mentoring programmes.
9. Involvement of Management experts/ institutions for the framework
10. Avail long term service of management/ sports experts
11. All associations should have a professional secretariat
12. Associations are to take initiatives to run all missions, schemes, projects, programmes and packages in their respective sporting areas.
13. Continuous monitoring and up-to-date planning.
14. Support of the Government system

PHASE TO PHASE PLANS

- Start with major State level associations
- Continue with District level bodies
- Spread across the state with Rural Sports Councils

PROTOTYPE

A prototype can be set up with any prominent association. Explore the possibilities of Collaborations, Tie ups, Networking, Partnering, Events, Leagues, Root level programmes, Infrastructure, Govt. funding etc.

AN INTEGRATED PLATFORM - TECHNOLOGY DRIVEN

Like An Enterprise Solution With A Public Interface

The entire process is to be mapped and shall be brought under a single platform. Each and every activity is to be tracked and monitored. It will give better access for public to avail entire services. The platform will increase the efficiency of the system. It shall be simple and easy to use. In other end it should be a tool for better governance. Every stakeholder in the Sports sector should get benefited with the platform. Employment openings, Recruitments, Academy admissions like informations also shall be provided. An archive, memory line, the history etc to be included.



Digital Platform- ERP & App

Model- Utility Apps, Corporate ERP

Advantage-

1. Networking
2. Mobile Density
3. Governance to technology
4. Transformation to technology

Requirement

1. Professional ERP connecting entire Operations
2. Networking entire Utilities, Services, Facilities
3. One end for Operations and other interface for utilities
4. Startups could be engaged
5. Public get easy access to entire services
6. Simple Interface
7. Reliability of Services

OTHER SUGGESTED PLANS THAT LEAD TO SCHEMES

Few more plans for the schemes are being worked out on the basis of the detailed analysis of Segments and micro segments and the assumptions based on that.

ROAD TO OLYMPICS (Talent Hunt & Development)

Department to provide basic guidelines. Sports associations to take lead role in the design and development of programmes on different potential segments. It's a target based Scheme. Intensive coaching is necessary for next big levels. It is desirable to give opportunities to other stakeholders too to get engaged in design and implementation of projects.

COACHES MASTERY (Skill Development And Overall Performance Development Of Coaches)

Developing good coaches is a priority in the Sports development area. Key role is with Associations and the Sports council to coordinate and collaborate.

CENTRES OF EXCELLENCE (Target To Develop 100 Centers Of Excellence)

It's a result oriented project. Call for applicants with a good track record. A fully participatory model. Engage more Stakeholders. Government to provide the process chart and guidelines.

INVEST IN THE FUTURE (Private Companies, PSUs, Cooperatives, MNCs To Invest In Various Opportunities In The Sports Sector)

This is the most important part in the development of Sports Economy. A centralised coordination required for the Preparatory programmes, Investor meets, One to one meets and for thorough follow ups. Media communications must go parallel. We have to attract investments for Professional Clubs, Academies, Sports Complexes, Sports Arenas, Sports Events & Properties,

SPORTS HUB

A sports hub in International standards for higher level coaching. Analytics and researches similar to how Madrid Sports Hub is conceived.

ONE SCHOOL ONE PRIME SPORTS (*Targeting 5000 School/ College Teams In Different Discipline*)

Motivate Schools/ Colleges to focus in a prime sporting item and to develop at least a team in that particular sports. General Education and Higher Education departments to get involved.

CATCH THEM YOUNG- ROOT LEVEL COACHING

Rural Sports Council has to set up at least one academy in their local body where particular sporting item has importance.

WELLNESS WITH AYURVEDA

An SPV needed in the implementation. Essential to attract more enterprises. Standardisation procedures to be drafted. Exceptional promotion in Global market is the key.

CAREER TRACK (*A Career Pathway/ Networking Platform For Talented Players To Get Placed*)

An officer in charge and a team is required for the coordination. Networking of agencies essential for exploring the opportunities in the International levels. It shall be a permanent facility for placement assistance related with sports.

SPORTS TOURISM

Development of properties; Coordination with Tourism department is vital. Inter departmental coordination and promotions are needed. Collaborative efforts will enhance the process. *Sports Museum* is a suggested proposal.

KERALA GEMS

Sevens Football Premier League, League on Tug of War, Water Sports Festival, Kite Festival etc have such a potential of growth.

SPORTS FILM FESTIVAL -Sports based films exhibited in open stadiums will give a great experience to Sports and Art enthusiast.

ALL TO SPORTS

Massive campaign to plan for the root level implementation. Different Schemes to roll out. Directorate, Sports Council and Associations to initiate different programmes. *Home Sports, Community Sports, Women Sports, Veteran Sports, Institutional Sports* etc to be addressed specifically. All should get a stake in the Sports sector development. All should get benefitted too.

LET'S STARTUP

Coordination with State Startup mission. An SPV is essential. Hackathon like programmes, Incubation, Funding and thorough follow ups needed in the moulding stage. A startup Village/ A Special Zone for sports related startups shall be setup focusing Sports, Fitness, Wellness, Physical Activities Etc.

FITNESS FIRST

Fitness campaigns shall be massive, grass-rooted and with central coordination. Technology should be incorporated for such a massive drive. There could be indicators such as Control Obesity, Lose Weight etc

INFRA FOCUS (*1000 Sports Arenas, 25 Sports Complexes*)

It's the continuation of an Investment process. Special focus is needed on infra based investments. Sports Kerala Foundation has a key role. It may go parallel with the Core Investment process. The Business proposition and revenue model to be defined specifically for Sports arenas and sports complexes.

EVENTFUL (*More Leagues, Tournaments & Championships*)

Associations should play key role in developing leagues. State Sports Council, District Sports Councils, State and District associations have to take the initiative. Direct involvement is essential for revamping prestigious tournaments. Participation of different agencies/ organisations is also important.

PROJECTS & PROPOSALS

Sl. No	Proposed Project / Scheme	Nos	Segment	Sporting Item	Explanation	Impact	Cost (In Lakhs)	Source of Funds
1	Coaches Clinic - Intensive Coaching - Short Term- 3/5 Days	20	Training and Coaching	All popular and potential items	Sports Directorate and Sports Council shall create a guideline. Associations should take the initiative.	Well-trained, professional coaches with proper exposure will have the sufficient capabilities to develop excellent talents. It will act as an additional skill acquisition programme apart from the formal certification programme.	60	1. Govt and Associations 2. Sponsorships 3. Fund Assistance from PSUs and Corporate
2	Coaches Clinic - Long Term - One Year - Continuous programme	10	Coaching	All Popular and Potential items	Same as above	Same as above	100	1. Govt and Associations 2. Sponsorships 3. Fund Assistance from PSUs and Corporate
3	Centers of Excellence - 4 Years	100	General	Various items	The Centers of excellence shall be the working sports centers. It can be Schools, Colleges, Academies or Facilities.	These specialised centers with excellent coaching facilities, infrastructure and coaches will mould excellent talents.	50000	1. Suggested for PPP Model (Government spend can be reduced to 10000 Lakhs)
4	Target Olympia Talent Pool		General	Various items	A pool of talents to be selected from different age categories and to be provided with better mentoring and coaching. Foreign, National exposure is to be provided. The target shall be big such as Olympics, Asian Games, World Championships etc.	Selected candidates under the scheme will get special privilege and attention. The authorities can provide them with special focus and care.	1000	1. Sponsorships and corporate involvement is suggested to reduce the government spent. (Govt spend shall be restricted to the maximum of 2500 Lakhs)

PROJECTS & PROPOSALS

Sl. No	Proposed Project / Scheme	Nos	Segment	Sporting Item	Explanation	Impact	Cost (In Lakhs)	Source of Funds
5	BRIDGE - Placement and Recruitment Facility		Employment	General	Special focus and monitoring on the job openings and career opportunities in entire sporting and allied sectors. All opportunities available both nationally and internationally shall be identified and enlisted. A formal network is to be developed connecting both recruiters and recruitees.	The talents will get placed properly. If a system for monitoring, it will increase the chances of talents to be placed in good positions.	10	1. Government
6	Sports Conclave		General	General	A general ideation and consolidation programme conceived in hybrid model (Online and Offline combined). It will be a pitching platform for Kerala sports to share its opportunities and potential before the world.	The initial pitching is so important. It shall create a feel that the state is much dedicated with the sector and open for investments, participation and collaboration. It will create a confidence among the stake holders.	25	1. Sponsorships (Govt allocation could be limited to 10 Lakhs)
7	Hackathon		General	General	One month online - offline campaign to get better ideas from the public for the development of sports. It shall be conducted at various levels and different formats. One to one meetups, Cluster meets, large conclave etc are needed in the segment.	The inputs may enhance the process and it will become participatory and inclusive.	10	1. Government
8	Investor Meets		General	General		It is essential to attract large volumes of Private, Cooperative, NRI and Public sector investments. It has to be the flagship activity so that the entire sector could be transformed by large.	25	1. Government

PROJECTS & PROPOSALS

Sl. No / Scheme	Proposed Project Nos	Segment	Sporting Item	Explanation	Impact	Cost (In Lakhs)	Source of Funds
9	Let's Start up	Startups	General	Various components are included in it. Primarily inviting fresh ideas to setup startup ventures in sports. Fund support is to be provided. Networking with Venture Capitalists interested in Sports, is needed. Incentives and other support are to be provided for the startups.	The innovative ideas will transform the sector significantly. Startups have the capability to disrupt the current scenario and grow significantly.	10	1. Govt to create the eco system, do networking, and arrange basic funds for the facilitations.
10	Sports Startup Village	Startups	General	Dedicated space can be allotted with the available sports infrastructure such as Stadiums or Sports Complexes.	Kerala will become the 1st state to setup startup village dedicated to Sports.	25	1. Government (In order to make the project viable, available infrastructure could be leveraged)
11	Sports Incubators	Startups	General	Invite Sports incubators from the performing Colleges/ Academies to facilitate the sports startups. Especially in infrastructure and other sports related facilities.	It will support the startup eco system and will help youth with innovative ideas to shape up and to develop.	10	1. Government (Govt shall also support the startups with performance wise incentives)
12	Sports Medicine	Sports Medicine	General	Identify the centers with the necessary facilities and build a network or consortium. Integrate all streams of medicine. A media campaign is essential for the promotion world wide.	It will meet the requirement in domestic, national & international levels. There is scope to develop it as part of Medical Tourism as well.	10	1. Government to manage the combined promotions. (Govt spent could be limited to a maximum of 25% of the entire campaign cost.

PROJECTS & PROPOSALS

Sl. No / Scheme	Proposed Project	Nos	Segment	Sporting Item	Explanation	Impact	Cost (In Lakhs)	Source of Funds
13	Ayurveda Wellness	100	Wellness	General	Wellness side of Ayurveda to be focused as a part of the mission. Standardisation to be ensured in case of treatment and procedures. Wellness part of Ayurveda is more connected with Tourism. In the new definition of Sports Industry the segments Sports, Fitness, Physical Activities and Wellness comes together, under it.	It will bring a great boost to the wellness industry. Wellness has the potential to become a major contributor to the Sports Industry. More centers to be developed and the segment is to be developed with specific identity. A world wide campaign is to be arranged, branding Kerala as the destination of Wellness solutions. It's also possible to integrate with Ayurveda, including multiple ayush streams and rich herbs.	25	1. Combined efforts of Government and the Industry are needed.
14	Sports for All		Campaign	General	It's an integrated campaign to promote all inclusive sports and to ensure the participation of all in sporting activities.	It can influence the mindsets of people so that gradually, sports and sporting games becoming an integral part of life.	10	1. Government
15	Sports for Change		Campaign	General	The integrated campaign to tell the stories of achievers who could transform their lives through Sports. All these will be inspiring stories focusing the youth to get motivated. It will be an inspiration for parents too to support their children to get engaged in Sports.	The campaign is supposed to be a game changer. It will inspire the young generation. The ultimate aim is that more people would start loving sports and consider sports as an agent of change	10	1. Government
16	Soccer Premier League		Event	Football	KFA has already initiated such a league in collaboration with a corporate sports entity.	Enough potential for such a league. It is to be developed as a premium screen product as well.	Nil	

PROJECTS & PROPOSALS

Sl. No	Proposed Project / Scheme	Nos	Segment	Sporting Item	Explanation	Impact	Cost (In Lakhs)	Source of Funds
17	Volley League		Event	Volleyball	The state has enough and more players and enthusiasts statewide.	Several potential venues available. Conducting multiple popular games in the league format will definitely add spirit to the sports enthusiasts across the state.	Nil	
18	Basket League		Event	Basketball	There is no dearth of talent or viewers. Many institutions are giving priority for Basketball.	Conducting multiple popular games in the league format will definitely add spirit to the sports enthusiasts across the state.	Nil	
19	Cricket league		Event	Cricket	Huge scope to conduct Cricket Leagues similar to the way it's conducted in Taminad, where it is a huge success.	Conducting multiple popular games in the league format will definitely add spirit to the sports enthusiasts across the state.	Nil	
20	Sevens Football Premier League		Event	Indigenous Sports	Most favorite and crowd pulling local sports. Enormous potential for the same, if developed scientifically. Pro Kabadya League is a model for the same.	Sevens Football also has immense Cultural and Tourism potential too.	Nil	
21	League in Tug of War		Event	Indigenous Sports	Important local sports product with huge potential and popularity.	Can be moulded as a good professional sports and a great screen product.	Nil	
22	Water Sports Academy		Coaching	Water Sports	Geographical Advantage - Enormous potential for talents - Rich heritage	This world class Academy will be a catalyst of growth in Water Sports for entire country. A detailed plan is to be developed and implemented for feeder academies as well. This could be made possible, by leveraging the presently running water sports centers.	500	1. Govt with a Private/ PSU participation.

PROJECTS & PROPOSALS

Sl. No	Proposed Project / Scheme	Nos	Segment	Sporting Item	Explanation	Impact	Cost (In Lakhs)	Source of Funds
23	Well packed events and Event Calendar		Event	All Sports Items	A mechanism to plan the events and to prepare a calendar for atleast two years. Also, the initiatives to conduct more tournaments in multiple sports to be coordinated. Special focus to be there to revive the faded championships which were hugely popular once.	Tournaments to be conducted at different levels. Events to be conducted in both cities as well as rural areas. More focus to be given for small towns and rural areas which are really sports enthusiastic.	5	1. Govt to act in the role of a facilitator, setting up the vehicle and managing the network.
24	One School One Sport		School, College Sports	General	Schools, Colleges, Self Finance Institutions and Technical Education institutions will come under this scheme. One institution to promote atleast one sporting item as their area of focus. Focusing on multiple items and developing more teams is acceptable; but there shall be focus for at least one item.	This will provide a boost to the Sports development as institutions also have the capability to influence coming generations.	Nil	1. The institutions shall mobilise funds for organising clubs, academies and coaching facilities in a participatory model. (participation of Students, PTA, Alumna, Local Enterprises, local bodies, Co operative, nearest PSUs, Sports Companies, Sports Retailers and Corporate to be ensured).

PROJECTS & PROPOSALS

Sl. No	Proposed Project / Scheme	Nos	Segment	Sporting Item	Explanation	Impact	Cost (In Lakhs)	Source of Funds
25	Sports Council in Local Bodies		Policy	General	Government has initiated this as a policy. The need of the hour is successful implementation without delays. A decentralised approach will help for the all inclusive growth.	This will act as a strong supporting mechanism in root level for the widening of Sports Economy	Nil	1. Local body fund could be utilised for setting up infrastructure and facilities. 2. It can also be operated through participatory model.
26	One Cluster, One Event		Policy	General	Local Bodies/Sports Council/ The Centeres of Excellence/ Deemed to be excellent centers' Sports Arenas/ Sports Complexes/ Sports Clubs to take the initiative for such events.	Such initiatives will strengthen the local sports items significantly. Such events could be conducted regularly in regional wise approach. It will help the state to become a happening spot of Sports	Nil	1. The entities shall organise funds for conducting such events locally. 2. Govt can support with some excemtions in entertainment tax and provision of incentives.
27	Infra Mission		General	All Sports	Stadiums, Arenas, Coaching Facilities, Sports Complexes, Swimming pools etc to be constructed in places on a requirement basis with detailed need assessment and impact studies	The Sports infrastructure is essential for the development of sports in every aspect. It will not be possible just with Government initiatives. A participatory model is necessary. It is essential to promote entrepreneurs to invest in sports infrastructure on viable propositions.	100000	1. Large and Small investments are to be attracted from Private, Public and Cooperative sector and the system is to be operated in a PPP model. [Govt Spend can be minimised such as up to 10000 Lakhs]

PROJECTS & PROPOSALS

Sl. No	Proposed Project / Scheme	Nos	Segment	Sporting Item	Explanation	Impact	Cost (In Lakhs)	Source of Funds
28	Survey and Geographical mapping		General	General	To get an exact idea of Sports infrastructure, facilities, sports goods manufacturing and sales etc in different sectors and categories from root level.	It helps for better planning and to understand the requirements.	25	1. Government
29	Departmental Participation		General	General	Engage more Govt departments in Sports. Liaisoning and Follow ups are necessary.	It will enhance the inclusive nature.	Nil	
30	PSU Participation		General	General	The profit making PSUs under the State Govt and Central Govt can actively participate in Sports related initiatives. Govt to setup a mechanism to channelise it.	PSUs can contribute to Clubs, Academies etc and also can provide with suitable employment opportunities.	Nil	
31	Cooperative Participation		General	General	The strength of Cooperative sector in Kerala is incomparable. If the sector actively participate in the Sports economy and activities, it will be a real game changer.	It will be a power booster for the Sports sector.	Nil	
32	Sports Goods Manufacturing Industry Cluster		Manufacturing	General	Govt has already taken up the proposal, started discussions, and planning to set up the first cluster at Kozhikkode. The scope for Sports Goods and allied product manufacturing industries in Kerala is high. We have to tap the potential.	As a strong consumer state, we must focus more on manufacturing to balance the growth and to tap the real potential.		1. Government to provide land and basic infrastructure.

Sl. No	Proposed Project / Scheme	Nos	Segment	Sporting Item	Explanation	Impact	Cost (In Lakhs)	Source of Funds
33	Sports Hub		Coaching	General	A high performance centre in the model of Madrid Sports Hub	The selected talents (Talent pool) can give high level of training	5000	Govt funds and corporate inputs.
34	Sports management, Research and Technology Centre		Coaching	General	A special centre like IMG to train Coaches to perform to their peak levels. All modern facilities for Analysis, AI intervention, management mantras, motivation techniques required.	The Selected special coaches to be trained here. Refreshment programmes can be arranged regularly	1000	Govt funds and corporate inputs.
35	Sports Museum		Tourism	General	An archive of World, India and Kerala	It will be a motivation and inspiration to the new generation	1000	Govt funds and corporate inputs.
Grand Total							158860	

The Sports Economy Mission is focusing on tangible results whether it is Economic or Non Economic. The Economic outcome can be quantified easily. The process suggested for the quantification of the non economic outputs too. As Sports is concern both are relevant.

Outcome- Economic Growth

The mission will be ensuring the economic growth and prosperity through various schemes and projects suggested for the selected segments, micro segments and Sporting Items. It targets on the contribution of sports in Kerala Economy to be at least 3% in 4 years. Now it is assumed as 0.8% and a 4 fold growth is expected. Due to Covid pandemic certain manufacturing and service sectors are badly affected and emerging sectors like Sports can contribute a lot. The mission envisages Kerala Sports Industry as a Rs. 40,000 Crore Economy by 2026.

Outcome- Ensure Effective Employment Generation

The mission aims to generate jobs in multiple folds and projecting 100% growth in domestic jobs in coming 4 Years. It is achievable with the massive growth in the investments in Infra, Events, Facilitation, Operations & Services. It will also tap the potential employment avenues in National and International levels that include core sporting and allied promising areas. A formal placement facility will be initiated to facilitate the same.

Outcome- Excellence

The mission is committed to develop excellent talents who will be internationally competent in a decided timeframe. The Government already initiated for High performance centers including a High Altitude Training Center. The mission targets to develop 100 centers of excellence in multiple disciplines in another 4 years. Two major Schemes are suggested for developing a peak performance talent pool. They will be provided with excellent facilities, coaches and national and international exposure. The performance will be tracked, monitored and analyzed. Incentives will be provided by assessing the performance. A special scheme for developing excellent coaches is also proposed.

Outcome- Civic Pride

The Keralites will feel proud, united and connected to their communities through participation in, and hosting of, sports activities, events and major games.

Outcome- Enhancement in Employability

People will gain physical literacy and sports skills that allow them to practice, participate, compete and excel in Sports, deriving personal pleasure and pride in their accomplishments and acquiring skills that can be transferred to other areas of practice. Sports is an effective tool of Skill development and it effectively transforms people to be more employable.

Outcome-Improved Health and Wellness

Participating in Physical activities or Sporting activities on regular basis strengthens personal wellbeing , provides recreation and relaxation, reduces stress, improves physical and mental health and physical fitness. It enables peoples to live more productive lives.

EMPLOYMENT GENERATION (DIRECT & INDIRECT) AS AN OUTCOME

Sports is a great employment generator. More youngsters and general public are now considering Sports as a full time Career. Anybody opting sports as a Career has got enormous opportunities today to grow worldwide. In professional leagues tremendous opportunities are there for the talented. There are openings here and abroad.

Central Government, State Government, Public Sector, Railways and Defense Services and Police are recruiting sporting talents every year. There are about 10,000 plus new opportunities in core sporting areas and more than 25,000 openings in allied sectors every year in India. It will increase with the emergence of Sports as an Industry. Involvement of private sector also causes the increase in employment. Sports Management, Training, Analysis, Equipment Manufacturing, Wellness products, Sports Products Sales etc create vast opportunities in terms of employment.

When Economy grows more employment opportunities will be generated domestically through Sports Operations, Events, Education, Marketing, Venues, Coaching etc. Indirect job opportunities in Construction, Media, Facilitations also will increase.

Sporting Talents, Sports Allied Sectors, Engineering and Management - JOB SEGMENTS

Sports Club Recruitments

Sports Quota- Kerala

Sports Quota- National

School, College Teachers

Full time Coaches

Sports Management

Sports Engineering

Specialised Construction, Engineering

Event Based- Contract

Media

Sports Governance/ Associations etc...

Sporting Talents - POTENTIAL AREAS AND STRATEGIES

Potential Area- Sports Recruitment- Core Sporting Talents

Model- Haryana, Punjab

Advantage-

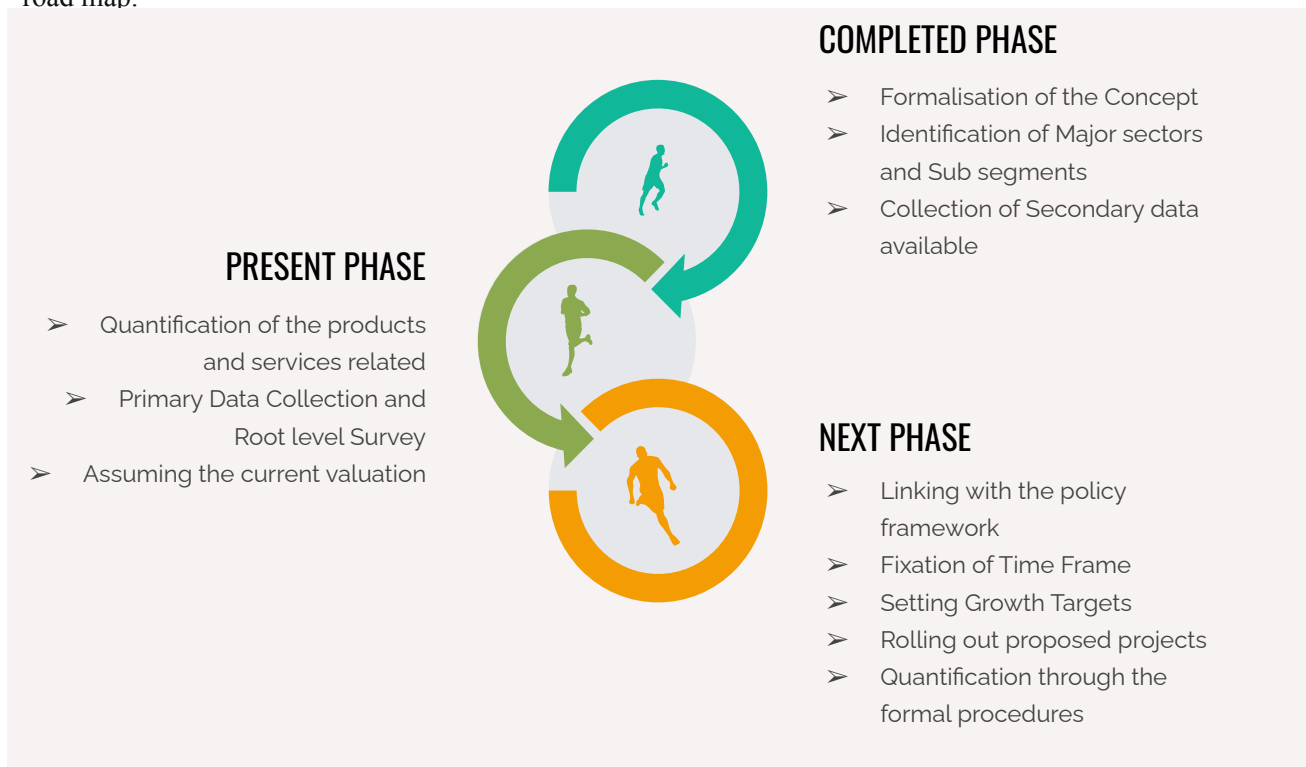
1. Clubs, PSUs, Defence Services, Banks, Railway, Private Sector is doing recruitments of sports talents.
2. Kerala is considered as a talent pool of sporting talents.
3. Emerging players in every segment.

Requirement

1. An entity/ hub/ mechanism to coordinate the entire process. It shall be under Sports Kerala Foundation/ Sports Council.
2. Consolidate the openings and opportunities
3. Promote Sports recruitments in Police, KSEB, KSRTC, Govt. Boards, Departments and Public Sector Companies.
4. Increase the involvement of private sector- Create awareness in them on the advantage part.
5. Database of employees who get recruited through Sports Quota with year to year update.
6. To explore avenues beyond borders; in other states and even in other countries.

This is an evolution chart where the entire project is partitioned to 3 phases; out of which the first phase is completed and the second phase is running. The Implementation Strategy Formation and the Preparation of Roadmap are the priorities in this phase of the project. Detailation of each Schemes, Projects and Programmes are completed on this next phase.

It's a long process and is evolved through many steps from the conceptual level. The State Government has agreed in principle to develop the Sports sector as an Economy. A broader definition was formed. Drawn the boundaries. Further by using the available secondary data the quantification process has been done. Many assessments have done in between to analyse the potential. Lot of discussions were completed with the stakeholders. Identified the potential segments and micro segments. Micro level assessment was done on these specific areas. The strategy is formed by depending all these foundation. THE historical backdrop was a strong base. The core areas of growth was identified. Considering all these the proposals for the projects, schemes and programmes were prepared. The cost calculation for the projects was done along with this. The financial viability has been studied in depth. Here is a graphical representation of the snap shots of the project road map.



Explaining here the step to step plans from the ideation to the desired Goals. On this project we have completed few initial steps. Concreting the idea/ concept was the among the first. It was followed by the detailing, quantification/ sizing, projection, segmentation and the analysis. On the present stage the segments are analysed in detail and specifically. The Sports Economy Sector and its segments are defined with better clarity. A brief plan of schemes in sector wise and in general has been prepared. It has to detail further. Concrete schemes to be evolved in the next phase. The impact of each schemes needed to be assess. The target has to fixed and a roadmap and a timeframe to be made subsequently.

DECISION

The policy decision to build it up

COORDINATION

Coordination of various departments such as Sports, Planning, Statistics, Industry

DATA

Data gathering & compilation

IDENTIFYING

Identifying and analysing facts and figures

SELECTION

Industry size, contribution to GSP etc.

MILESTONES

Setting milestones and timelines

STRATEGY

Setting working plans and supported strategies

ROADMAPS

Preparing roadmaps & fixing parameters and indices

TARGETS

Measures, roadmap, working plans

Conclusion Remarks & Process summary

Developing a Sector as a part of GDP and Economy is a long process and involved many phases and steps. Sports is a multifaceted activity sector and it required multi dimensional approach. Here is a brief summary of the process, components, elements, output, outcome and impact compiled in brief.

Defining Sports Economy- All economic activities such as products, services and operations in the Sports, Fitness, Wellness and Physical Activity Sector in the state

Kerala Model Development- The renowned Kerala Model in Education, Healthcare and Tourism is an inspirational factor for such an ambitious mission.

Pioneering in India- The Sports Economy development is first experiment ever in India. Only developed countries have such a sector in Economy

Contributing Health- The sports development has a direct and indirect impact on Health

Multi dimensional Impact- The development has an impact on Industry, Manufacturing, Retailing, Consumption, Media, Health, Education, Sociology, Skill Development, Employability, Employment generation and many more.

Output- Economic and Non Economic outputs, Tangible and Intangible.

Indexes- GDP/GSP, Human Development Index, Happiness Index, Wellness, Various new indices of Niti Ayog like Indian Healthcare Index.

History, a strong foundation- The rich heritage and legacy of Kerala Sports is a strong base for developing Sports Economy

Kerala is Unique- Many unique characteristics of the state is an advantage for the initiative

Relevance- Much relevant and timely because of the post covid situations. Serious concern over immunity. Mental health, Emotional strength and the Digital addiction are other major concerns

Benefits- Quantified results, Tangible Outcome, Target oriented process flow, Statistical base, Proper Data Pillars of Strategy- Participation, Quantification, Segmentation, Convergence, Collaboration, Industry Approach and Exposure.

Approach- All Inclusive Sports, Sports for Change

Financial Viability- Government spend will be moderate. Participatory model resource mobilisation is the core.

Impact- Economical, Health, Social

Opportunities- Sporting, Employment, Employability, Skill Development

Complementary Factors- Psychological, Emotional, Fitness, Preventive health, Behavioural, Personality, Habitual, Attitudinal

Preparatory Events- Conclaves, Hackathon, Investor Meets, Campaigns

Thrust Areas- Talent Development, Coaches Training, Leagues, Events, Infrastructure, Investments, Ventures, Startups, Technology, Science & Management, Wellness, Career path, Sports Tourism, Cultural Linkage, Fitness Programmes, Skill Development, Root level programmes, Institutional, Community, Recreational, Home Sports, College, School Sports, Sports Medicine.

Segments- 25 Major segments & 225 Micro Segments

Economic Activities- Total activities compiled is in the value of Rs. 8560.85 Crores. Contribution towards GSP is 0.875% in 2020-21.

Target- Contribution to GSP- 3-4%. Total Economic Activities- Rs.40,000 Crore/ Per year in 4 years.

Employment Generation- Direct/ Indirect employment of 25,000 and a value of 1781 Crore

Target of Employment Generation- 1 Lakh jobs directly and indirectly in 4 years. Export of Skilled personnel- 5000 per year.

Projects, Programmes & Schemes- 40 Plus programmes, Projects & Schemes suggested.

Outcome- Economic growth, Sporting Excellence, Employment Generation, Skill Development, Employability, Civic Pride, Physical & Mental Health

Phases - Total 3 phases and the 2 phases are completed with the DPR and next is the implementation.