

# AN INDIA ECONOMIC STRATEGY TO 2035

NAVIGATING FROM POTENTIAL TO DELIVERY



## SPORT SECTOR SNAPSHOT

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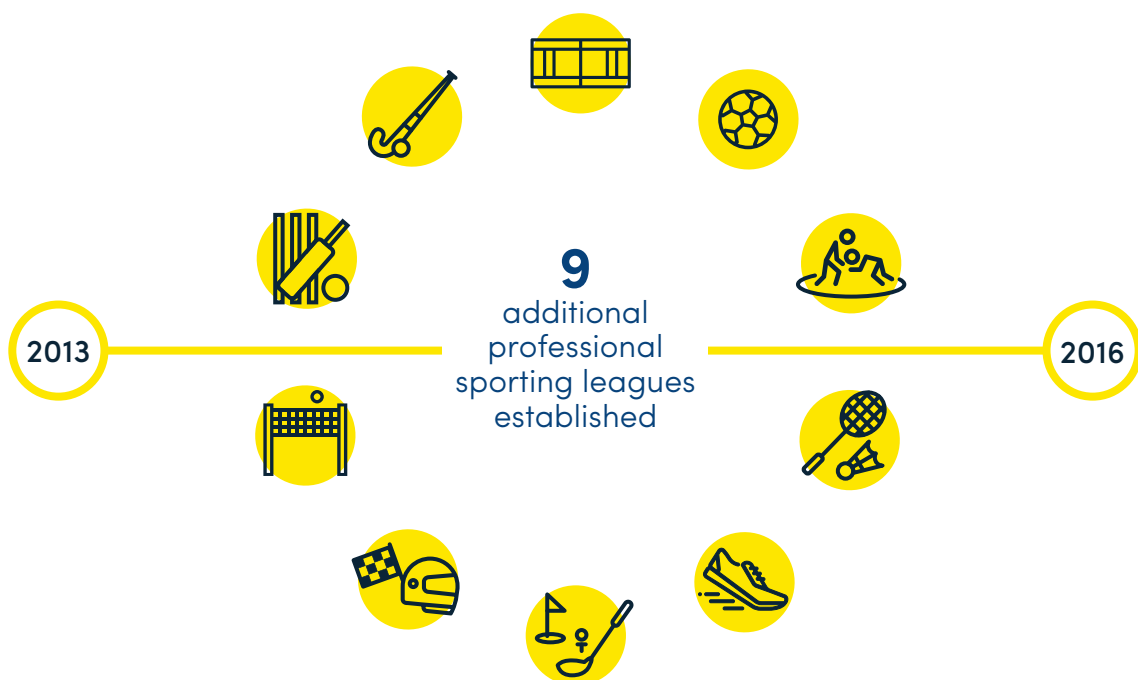


#IES2035

## OVERVIEW

- Greater sports participation is critical to the future health and productivity of India's large population. The rate of grassroots participation is low, but the scale and potential is immense.
- India already looks to Australia as a model in sports for achieving results. Supporting India's sport agenda can help Australia entrench positive relationships with Indian governments and businesses.
- The Indian Government's renewed priority on sports is driving demand for better sports systems, including better sports performance at the elite level, sports management services, training and governance expertise. Australia is well placed to support India to pursue this agenda.
- Demand for sports training, sporting goods and sponsorship money is also growing thanks to India's burgeoning consumer class.
- Besides the Indian Premier League for cricket, nine professional sporting leagues were established between 2013 and 2016.
- The Strategy makes clear that much of the engagement in sports services will remain on a non-commercial basis, although commercial engagement will increase out to 2035. Commercial opportunities are emerging in schools physical education, event management, high-performance and sports medicine.

## EXPANDING PROFESSIONAL SPORT IN INDIA



# OPPORTUNITIES FOR PARTNERSHIP

Sport is not a typical industrial sector. For Australia there are three distinct aspects.

First, many of the obvious means of engagement are not commercial: government dialogue, policy support and community relationship building. Such engagement is valuable and brings broader benefits.

Second, sport also signals our values and capabilities. Our sporting profile in India benefits 'Brand Australia'. Our sportspeople achieve celebrity status and promote positive images of Australia. Sports diplomacy is a vehicle for advocacy on gender equality, women's empowerment and disability inclusion, and for engaging Australia's Indian diaspora.

Third, genuine commercial opportunities are also emerging in India for Australian sports service providers. There is an increasing appetite in India's education sector for sports training and expertise

as well as pockets of demand for sports event management cooperation, high-performance technologies and sports medicine.

While the size of these commercial opportunities does not compare with those of other sectors, sport can provide an entry point to India.

There is an interplay between sport and other sectors: education and skills, science and innovation, health, tourism and infrastructure. The strongest complementarity is in education and skills training, building on the established networks of Australian providers.

## OPPORTUNITIES FOR EDUCATION AND SKILLS TRAINING IN SPORT

Joint university degrees	Sports science	Sports medicine	Sports management
Professional development programs	Teachers	Trainers	Coaches
Leadership development	Executive training	Leadership development programs	
Online education	Online curriculum	Open online courses	
Curriculum development	Primary school sports and physical education		Secondary school sports and physical education

# CONSTRAINTS AND CHALLENGES

- Outcomes are likely to remain slow to eventuate and commercial engagement will continue to be modest.
- Indian businesses or agencies willing to pay Australian commercial rates for services or expertise are rare. Their number will increase out to 2035, but much engagement in the services sector will remain on a non-commercial basis.
- The lack of 'industry' status for sport (sports infrastructure aside), the absence of clear guidelines for business operations and the unorganised nature of the sector affects investor confidence. This leads to inadequate information and data, compounding uncertainty.
- A lack of accountability in Indian sports federations limits their effectiveness in supporting elite athletes. It will also pose challenges for direct partnerships until governance models are improved.

## OTHER OPPORTUNITIES IN SPORT



### Sports media and advertising



### Consulting

Sports governance  
Coach and athlete training  
Sports science  
Sports management  
Major event management



### High-performance training camps



### Data analytics

Applications to sports performance and technology



### Sports tourism



### Multi-use sporting precincts

Design  
Construction  
Management



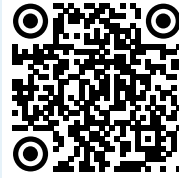
### Import and export

Sports equipment and technology



### Services

Sports medicine  
Physiotherapy  
Biomechanics  
Nutrition



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IN-DEPTH

## WHERE TO FOCUS

For Australia, trade and investment opportunities in sport are not limited to particular Indian states as the demand is nationwide, but several states have more advanced sports systems and present themselves as more prospective targets. Sport could also be used as a supplementary point of engagement in states Australia is targeting for other reasons.

Aside from the Central Government holding responsibility for the management of India's national teams, sport is a state subject under the

constitution with sports policy frameworks varying significantly across states.

**Haryana** and **Manipur** are considered to have strong sporting cultures and have produced many prominent sports personalities, including in boxing, cricket and wrestling. **Manipur** will also host the main campus of India's first National Sports University.

**Punjab, Kerala, Gujarat** and **Rajasthan** are states in which Australian state governments and universities have developed sporting relationships which could be expanded.



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