

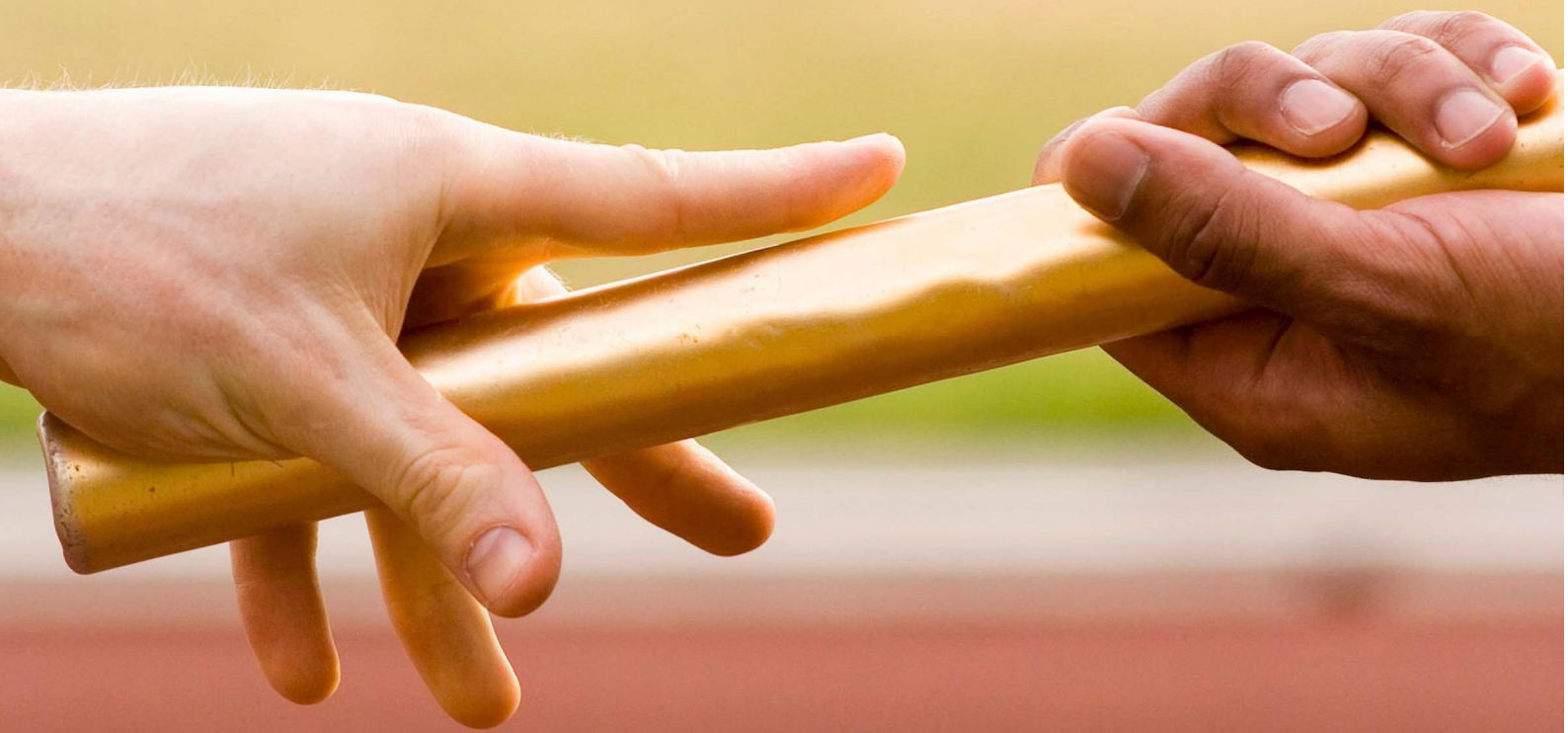


Regional plan and strategy for promotion of sports to enhance career/livelihood in NER

North Eastern Development Finance Corporation Ltd.



Executive Summary



Executive Summary

I. Introduction

Background

Sports has always been the ideal medium to catalyse strong life skills like teamwork, integrity, leadership on a sub-conscious level. Moreover, it's a perfect mechanism for social inclusion and support for the society and marginalized communities. It's also emerged as a means of livelihood through various interventions like sport leagues, fitness coaches etc.

In the last few years, sportspersons from the North East have highlighted the immense potential of the North East region has before the government and people. Spurred by this, the Government of India also begun developing sports infrastructure in the region like setting up of National Sports University in Manipur to encourage the participation of the local youth.

However, just like rest of India, the North East also has its share of talented athletes who were forced to leave sports mid-career as it's not a viable livelihood option. This coupled with the lack of awareness among people about the livelihood opportunities available through sports, have compounded the attrition of sportspersons further.

In this context, the North Eastern Development Finance Corporation Limited (NEDFi), undertook the initiative under its Techno Economic Development Fund (TEDF) and engaged EY LLP through competitive bidding to conduct a study and prepare a strategic roadmap on "Promoting Sports as Livelihood/Career Option in North Eastern Region."

Project Rationale and Terms of Reference of the Study

To help NEDFi achieve this outcome of promoting sports as a livelihood option in NER, EY has prepared a report covering all the 8 NE states viz. Arunachal, Assam, Manipur, Meghalaya, Mizoram, Nagaland, Sikkim and Tripura. Recommendations and roadmap have been provided for promoting sports as a livelihood option in the region along with detailed SWOT analysis of the NE states.

The following are the terms of reference of the study:

1. SWOT analysis of each NER state with regard to sports; its promotion, infrastructure, training/coaching centres available, etc.
2. Present status of Sports in the North Eastern states in terms of infrastructure, performance, impacts, etc.
3. Existing Central and State Sports policies/schemes for promotion of sports in the NER states.
4. Current status and potential of sports as a livelihood option in the Region.
5. Status and potential of adventure sports in the Region as an organized and commercial venture.

Roadmap identifying strategies for each state and development of a sustainable model to promote sports to enhance career/livelihood in the Region.

Approach to the Study

Firstly, a comprehensive secondary research was undertaken for understanding the unique geography and culture of the North East. A detailed secondary research was also undertaken to understand the sports sector in India as well as in North East, challenges faced by athletes to achieve excellence and expectations of stakeholders. Various leading practices from India and outside were studied to understand trends in the market for development of sports and learnings were derived from them while proposing the initial recommendations.

Various stakeholders like Sportspersons, Sports Departments, etc. were classified by the manner of interaction to be conducted with them. Sportspersons and Coaches were interacted through a primary survey to collect data regarding the age at which they start playing, challenges they face, etc. Interactions with other important stakeholders like Sports Departments, Sports Authority of India, Sports Associations, various clubs etc. were done through in-depth interviews and focused group discussions. EY team conducted surveys of 338 Sportspersons and 76 coaches during the field visits. EY team also met more than 120 stakeholders for one to one discussions and in-depth interviews.

II. Overview of Sports

Global Overview of Sports Sector

The sports sector has a significant impact on the global economy because of its close association with other sectors such as real estate, tourism, and media & entertainment. Moreover, sports has significant socio-economic benefits, it helps in improving the overall health and well-being of a country, and in promoting unity and increasing national pride among its citizens.

The size of global sports sector that comprises infrastructure, events, training, manufacturing, and retail of sports goods has been estimated to be approximately USD 595-695 billion in 2015, which is about 1% of global GDP. Further, in most of the developed countries, sports contributes to about one to five percent of their GDP.

The flow of Funds: How players earn their livelihood through sports across the globe

In any tournament or league, money flows in many directions, from fans to leagues/tournaments, brands to players/clubs; from fans to media, media to tournaments/leagues etc.

With the increase in the flow of money, the livelihood opportunities have also increased for athletes, coaches, and other support systems. As part of the project, EY has done an analysis to understand the flow of fund in tournaments and leagues. The analysis has helped us in understanding the sports ecosystem and livelihood opportunities which can be created through sports for people other than athletes and coaches.

International Competitions: Importance of high impact sports

Most countries are winning medals in few sports and the number of sports is reduced to a few for countries finishing with a respectable medal tally in the Olympics. Even the Government of India has a list of focus sports. Thus, it's important for the states of North East to identify the sports in which they can excel.

Sports Sector in India

Sports is yet to be recognized as a sector in India and no comprehensive study has been done on the industry's estimated size in the country, sports infrastructure is a recognized industry in India now after gaining industry status in February 2016. The potential value of sports infrastructure market is estimated to be approximately INR 80,000 Crore.

The sports industry in India has the potential to benefit a lot from the demographic dividends of India. As per the census, about 50% of the population of India is below the age of 24, and about 65% of the population is below the age of 35.

Also, the launch of various new leagues in recent past is changing the face of Indian sports. Now, the sportspersons can earn their livelihood through sports and can showcase their talent at global sporting events.

Other benefits of the sports

Socio-Economic Benefits

Numerous research has shown that active participation in sport improves community health and productivity, reduces medical expenses, imbibes discipline in character, generates great leaders, and enhances social cohesion. Further, the execution of a mega sporting event helps in developing infrastructure, generates employment, secure inflow of foreign capital, generates players and athletes, and thus contributes significantly to the economic development of a country or a region. The other significant contribution of sports and related sporting interventions is that the anti-social and crime-prone behavior of individuals, hooliganism, and youngsters is addressed by diverting their minds, aiding rehabilitation and development.

Regional Integration

Sporting activities and events contribute toward the development of stronger social networks and more cohesive communities. Also, the diversity of sports and sporting activities (including mainstream sports and adventure sports) makes it an ideal medium to reach men and women from every age-group, culture, and socio-economic background. Sports, in particular, is an important pillar for integration of the region.

III. Key Stakeholders

During EY visits to the states of the North East, the EY team visited districts identified through selection criteria based on the geography of the state. An indicative list of stakeholders that the team met during these visits to the states has been given below.

• State Sports Department	• District Sports Officers	• Sports Academies
• State Sports Associations	• Football Clubs	• State Planning Department
• North Eastern Council	• Private Corporates	• Adventure Sports Associations

Overview and Key Findings of Stakeholders Discussions

As mentioned above, the EY team conducted one to one interactions with more than 120 stakeholders in NE region belonging to different organizations such as Sports Department, SAI, Private Corporates like TATA and Reliance. EY categorized these stakeholders in below mentioned six categories and tried to identify challenges and issues faced by them. Some of the important issues have also been highlighted here.

S. No.	Stakeholders	Major concerns highlighted by the stakeholders
1.	State Government Sports Department	<ul style="list-style-type: none"> Challenges related to lack of policies and funding Need for capacity building to utilize central Govt. Schemes and explore other avenues of revenues like PPP and CSR funding etc. Inadequate coordination amongst various sports bodies which is hindering the process of development of athletes, organization of competitions etc.
2.	State Sports Associations	<ul style="list-style-type: none"> Lack of regular calendar events due to limited resources No performance-based reward systems
3.	Government Sports Institutions	<ul style="list-style-type: none"> Limited future opportunities for students willing to take up sports courses Sports science is still at a nascent stage in India
4.	Training Institutions / Professional Clubs	<ul style="list-style-type: none"> Limited exposure to athletes due to insufficient competitions Under-developed Sports Ecosystem in the NE states Shortage of certified coaches and certified trainers
5.	Corporates	<ul style="list-style-type: none"> No single sports body to develop NE as a region Government-run sports ecosystem
6.	Adventure Tourism Enterprises and Associations	<ul style="list-style-type: none"> Dearth of skilled resources and insufficient physical infrastructure Scanty of calendar activities like Adventure Tourism Festivals to put NE states on the map Minimal marketing and advertisement campaigns of existing Adventure Tourism Festivals

Survey Analysis

EY team conducted primary surveys with 338 Sportspersons and 76 Coaches. The objective of conducting these discussions and surveys was to understand the ground reality and challenges faced by various stakeholders in a structured manner. Recommendations in the report have been made elaborate via data collection and its analysis as done in this section. A separate analysis was done for Qualitative and Quantitative responses under this section. Some of the observations made through analysis of surveys are:

- Only 13% of sportspersons started playing a game at competitive level before the age of 10 and almost 87% sportspersons start playing a game at competitive level only after the age of 10, which is late for certain sports.
- More than 50% of the sportspersons in the NE states still face basic challenges like lack of coaches, equipment and physical infrastructure.
- The top three facilities required by the sportspersons from NE states to improve their performance are better coach (87%), better equipments (69%) and better ground/infrastructure (55%)
- Aspirations for more than 55% of the sportspersons is to secure a government job and there is a lack of awareness of other livelihood options. This also highlights lack of aspiration among young sportspersons.
- While 60% of the coaches attended coaching camps to upgrade themselves once in two or three years, the remaining 40% did not attend at all.

IV. Sports in NER

The North East region has tremendous potential for developing sports in India. The local youth are acknowledged for their natural inclination towards sporting activities and it's even more apparent from some best athletes from the region who have done the country proud, internationally. North Eastern region holds only 3.1% of the population of India, but it is a matter of pride that 6.72% of the total athletes representing India in Rio 2016 Olympics belonged to North Eastern Region. Also, 11 out of 21 players who represented India in U-17 FIFA World cup are from the North Eastern Region.

In order to compare the performance in sports of NE states with leading states in India, EY team conducted an analysis of performance based on certain parameters. The parameters identified to conduct the analysis are: medal tally of states in last four national games, number of trainees trained at various SAI Centres in India, number of participants per medal for School Games Federation of India (SGFI) games, number of participants per medal for Khelo India School games and the sports budgets of the respective states.

While states like Assam and Manipur are doing well in comparison to leading states in India, other NE states have not been able to match their performance levels. Despite achieving considerable feat in sports, these states still remain neglected in terms of infrastructure development, athlete development and schemes for development of sports to enable employment and tool for social development. North Eastern states still lack the required infrastructure and facilities in comparison to the number of international and national athletes they produce. EY team has done a SWOT analysis for NE as a region as well as for the NE states.

SWOT for NER Region

	Strength	Weakness	Opportunities	Threat
NER States	<p>I. Infrastructure at central level</p> <p>All the North Eastern states have at least one Sports Complex with an outdoor stadium and indoor stadium facilities. These sports facilities are mostly established near the state capitals.</p> <p>II. Sports Talent & Culture</p> <p>Gifted with muscular and agile physique, NE states have a good amount of sporting talent and with time they have developed a culture of sports.</p>	<p>I. Infrastructure penetration</p> <p>While some district headquarters in the NE states have one Indoor Stadium and one Playground as sports facilities, penetration of sports infrastructure at the grassroots level of villages is a major challenge.</p> <p>II. Sports Governance</p> <p>Only 3 out of 8 North Eastern States have Sports Policies to guide and frame schemes for various matters related to sports like roles & responsibilities of sports bodies, talent identification, monitoring & reward, and employment.</p> <p>III. Capacity Building</p> <p>Capacity building in sports ecosystem is required at various levels i.e. Sports Department employees to utilize government schemes; Sports Associations to attract investors for Public Private Partnerships, and parents and students for livelihood options available in sports.</p> <p>IV. Institutions</p> <ul style="list-style-type: none"> In the North Eastern States, there is lack of systematic institutions to develop sportspersons from grassroots to excellence level. Professions like coaches, physiotherapist, nutritionist, sports manager etc. have a huge potential to create employment and enhance career options in sports. NE states lack the institutions to produce skilled professionals. <p>V. Sports Events</p> <p>Except for Assam, Meghalaya and Manipur, other NE states have failed to host any major national or international sports event in the state. Organization of such events will not only</p>	<p>I. Opportunity</p> <p>Private investment can work in two ways for the betterment of sports in the state:</p> <p>Direct investment into sports: Private investment in terms of CSR funds or marketing funds for the organization of competitions, construction of infrastructure, the operation of academies and scholarships for athletes.</p> <p>Investment into support industries: Incentives for private industries to invest in support industries like Shoes, Apparel and Equipment making and these private players can cater to whole North East India as well as neighbouring countries like Bangladesh, Myanmar etc.</p> <p>II. Tribal Culture</p> <p>Since a large part of the population in NER belong to tribes who are good at sports like Archery. Talent from these tribal areas can be identified and nurtured to become professional and elite athletes.</p>	<p>I. Focus on other sectors</p> <p>Sports is a state subject and State Governments give priority to other sectors like industries etc. which are directly linked to more livelihood options.</p> <p>II. The culture of sports will not last long in the absence of correct policies, support and livelihood opportunities for sportspersons.</p>

Strength	Weakness	Opportunities	Threat
	<p>help in the development of better infrastructure but also in promoting sports culture and improve performance.</p> <p>VI. Education Curriculum</p> <p>Sports is not the part of the formal educational curriculum, which makes it difficult for parents and children to make choices between sports and education.</p>	<p>III. Career options in support activities:</p> <p>Alternative career opportunities like physical instructors etc. can be created through sports policies.</p>	

Apart from the SWOT analysis of the complete NE Region, EY team also conducted SWOT analysis specific to NE states considering the observations specific to the states.

Also, EY team identified high impact sports for the NE states based on the designed framework and data collected:

Sl. No.	Arunachal Pradesh	Assam	Manipur	Meghalaya	Mizoram	Nagaland	Sikkim	Tripura
1.	Football	Football	Football	Football	Football	Football	Football	Football
2.	Taekwondo	Badminton	Boxing	Badminton	Hockey	Badminton	Badminton	Gymnastic
3.	Archery	Table Tennis	Wushu	Boxing	Boxing	Boxing	Table Tennis	Badminton
4.	Karate	Boxing	Taekwondo	Athletics (Long Distance)	Badminton	Table Tennis	Boxing	Athletics
5.	Boxing	Taekwondo	Badminton	Table Tennis	Weightlifting	Athletics	Karate	Swimming
6.	Badminton	Archery	Judo	Wushu	Taekwondo	Hockey	Taekwondo	Table Tennis
7.	Wushu	Karate	Weightlifting	Judo	Table Tennis	Taekwondo	Archery	Wushu
8.	Weightlifting	Weightlifting	Archery	Karate	Judo	Wrestling	Hockey	Archery
9.	Table Tennis	Judo	Hockey	Taekwondo	Karate	Archery	Judo	Karate
10.	Judo	Fencing	Sepak takraw	Archery	Archery	Sepak takraw	Basketball	Taekwondo

V. Strategic Recommendations and Road Ahead

Based on the discussions with various stakeholders, leading practices study and data collected, EY has provided strategic recommendations to develop a robust sports ecosystem in NER and create employment opportunities through sports as mentioned below:

Strategic Recommendations	Strategies for implementation of recommendations
<p>Athlete Development Program; Grassroots to Gold</p>	<p>There is an immediate need to have a systematic system for development of athletes along with broad-basing of sports in North East Region. Most countries with a rich sporting culture like Australia, USA, UK and Canada have a long-term athlete development program.</p> <p>It is suggested to establish a tier-based structure for scouting sports talent and achieving excellence in sports. It is proposed that a three-tiered process can be created for developing elite athletes in the North East States.</p> <p>The process of talent scouting and athlete development can be completed in three phases which have been described below:</p> <p>Phase 1</p> <ul style="list-style-type: none"> • Component 1: Setting up of a Sports Nursery in each district of North Eastern State <ul style="list-style-type: none"> • 112 Day-boarding sports nursery in any one of the chosen high impact sports in each district of all the eight North Eastern States • The nurseries can be established in existing government and private educational institutes and will cater to the students in the age group of 6-12 years • Sports Nursery is estimated to provide a talent pool of approximately 4,000 raw athletes in various sports disciplines • It has been estimated that total cost of setting up of 112 sports nurseries each catering to 25 students will be about INR 7.76 Crores • Component 2: Establishing Football Baby League in different parts of North East <ul style="list-style-type: none"> • Considering the popularity of football in the region, it has been proposed to set up about 35 baby leagues covering entire North East Region • Baby league will provide children as young as 4 to learn footballing skills and play competitive matches at the same time • Baby league is expected to generate a talent pool of about 7,000 footballers in the region • The total cost for establishing 35 baby leagues is about INR 3.5 Crores <p>Phase 2: Setting up of a Sports Academy in each state</p> <ul style="list-style-type: none"> • The need for setting up of sports academy in each state has also been highlighted in the “Draft North Eastern Council Regional Plan (2017-18 to 2019-20)” • Residential sports academy can be set up in the capital city of each state with each academy focusing on 6-8 sports disciplines. It is also proposed that academy may enrol day-boarding students as well who are exceptionally good. • Existing residential sport academies like in Imphal, Manipur; Itanagar, Arunachal Pradesh; Agartala and Panisagar, Tripura; and Guwahati, Assam etc. can be upgraded to accommodate targeted students.

Strategic Recommendations	Strategies for implementation of recommendations																											
	<p>„ The academy will be responsible for training top 30 athletes in each sports discipline in the age group of 12-18 years.</p> <p>„ It has been estimated that total cost of setting up of 8 sports academies will be about INR 342.21 Crores</p> <p>Phase 3: Setting up of a Centre of Excellence in North Eastern Region</p> <p>„ It is recommended to set-up centre of excellence focussing on one sport in each North Eastern State. The proposed focused sport for each state is as follows:</p> <table border="1" data-bbox="624 622 1297 1093"> <thead> <tr> <th>S.No</th> <th>State</th> <th>Sports Discipline</th> </tr> </thead> <tbody> <tr> <td>1.</td> <td>Arunachal Pradesh</td> <td>Weightlifting</td> </tr> <tr> <td>2.</td> <td>Assam</td> <td>Badminton</td> </tr> <tr> <td>3.</td> <td>Manipur</td> <td>Boxing</td> </tr> <tr> <td>4.</td> <td>Meghalaya</td> <td>Football</td> </tr> <tr> <td>5.</td> <td>Mizoram</td> <td>Hockey</td> </tr> <tr> <td>6.</td> <td>Nagaland</td> <td>Archery</td> </tr> <tr> <td>7.</td> <td>Sikkim</td> <td>Taekwondo</td> </tr> <tr> <td>8.</td> <td>Tripura</td> <td>Gymnastics</td> </tr> </tbody> </table> <p><i>The above list is tentative and further detailed deliberations is required from stakeholders</i></p> <p>„ Centre of Excellence (CoE) can be part of Sports Academy and can also function as the high-performance centre of a particular sport in the region</p> <p>„ It has also been proposed that athletes should be divided into three categories viz. Gold, Silver, and Bronze based on their performance in various competitions for distribution of scholarship/stipend</p> <p>„ It has been estimated that total cost of setting up of 8 Centre of Excellences will be about INR 156.93 Crores</p>	S.No	State	Sports Discipline	1.	Arunachal Pradesh	Weightlifting	2.	Assam	Badminton	3.	Manipur	Boxing	4.	Meghalaya	Football	5.	Mizoram	Hockey	6.	Nagaland	Archery	7.	Sikkim	Taekwondo	8.	Tripura	Gymnastics
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<p>North East Derby League: Generating Livelihood through Professional Leagues</p>	<p>Considering the popularity of football in the North East Region, a football based North East Derby League (NEDL) is proposed wherein clubs from all the eight states will be given equal opportunity for participation. The league will help in providing livelihood to players from the region and give them a platform to showcase their talent.</p> <p>Some of the key considerations for the success of are as follows:</p> <ul style="list-style-type: none"> „ Players: It is important to ensure that top players are available for participation in the league as it will create interest among viewers and will improve the quality of the game. „ League Organizing Committee: To ensure a successful league, the formation of a central committee is recommended with minimum glitches. The composition of central committee will depend on who is organizing the league, which has been discussed in report in detail. „ Governance Framework: Support from National Federation is a must and there should be equal representation from all the eight states in the central governing body of the league. „ Stadium Infrastructure: Participating clubs should ensure in coordination with state and local government that stadium is of as 																											

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	<p>best quality as possible. This will contribute to the viewing experience of fans, which increases the level of interest in sports.</p> <ul style="list-style-type: none"> • League Timing: The schedule of the tournament has to be carefully decided. It has to be ensured that: <ul style="list-style-type: none"> • No other major national/regional level football league is being organised simultaneously that can divert a significant section of the TV viewers. • Maximum players are available for selection/participation. • Marketing: An effective marketing campaign will play an important role in increasing the league's popularity. Involvement of various local celebrities as brand ambassadors or owners in NEDL will help in popularizing the league. • Prize Money: It is important to have a good prize money on offer for team as well as for individual category. This will help in attracting teams and encourage top players to participate in the league. • Fan Base: An effective strategy to increase the fan base of existing clubs or new clubs. This will help in generating greater TV viewership, increased attendance in matches and sale of merchandise. <p>The two major options which have been discussed in the report and can be explored in detail for organizing the league are as follows:</p> <p>1. Leveraging existing teams</p> <p>In this preferred option, one team from each state will represent the respective state in North East Derby League (NEDL).</p> <p>The key features of the league are:</p> <ul style="list-style-type: none"> • Governance committee should be set up which will oversee the functioning of the league. • Initially, state champions from states which hold state league will participate. State which doesn't hold any league can nominate a club for the initial season or select a team through the state-level tournament. Total of eight teams can participate in the inaugural season of NEDL. • All states to be encouraged to organize regular state level league. • All participating clubs should have annual contracts with players with a pre-defined base salary. <p>Other details like league season, league format and financial aspects of the league have been discussed in detail in Section 6.2. The income and expenditure statement shows that league might be profitable in its ninth year from the date of its inception.</p> <p>However, detailed analysis will be required before arriving at a decision of a league launch.</p> <p>2. Starting from Scratch</p> <p>Another option is to start a league from scratch. Initially, the league must be conceptualized, and structure and number of teams in the league should be finalized. It's suggested that eight teams be created from each state with innovative names symbolizing the states and their culture. Thereafter, bids can be invited for the ownership of teams.</p> <p>The details modalities of the league should be worked out in consultation with new owners and other stakeholders such as AIFF, State Governments and State Football Associations etc. Once the league structure is developed and number of teams are finalized along with franchise fees and details. Thereafter, a business case can be developed for this option.</p>

Strategic Recommendations	Strategies for implementation of recommendations
<p>Promotion of Adventure Tourism in NER</p>	<p>India's adventure tourism industry nearly doubled in size in the years 2009-2014. It is driven by a key shift in interest towards adventure sports, primarily from domestic tourists who are looking beyond clichéd holidays, for new experiences. Although the share of NE states is not significant in Adventure Tourism industry, it must be capitalized to drive growth considering its suitable terrain and natural beauty.</p> <p>A two-pronged strategy is recommended for the region to create livelihoods in the region through adventure sports.</p> <ol style="list-style-type: none"> 1. Create a pull through branding and marketing activities among the target group to visit this region. 2. Create an enabling environment by making improvements in soft and hard infrastructure for providing a quality experience. <p>Market research for Adventure Tourism</p> <p>EY conducted a primary research through survey questionnaires to measure awareness about adventure sports in NER, sources for information for decision making, challenges in planning a trip to NE states and recognition of adventure sports activities in NER. EY also performed a Brand Personality Analysis to assess the perception of adventure tourists towards the North Eastern States.</p> <p>The analysis shows that while the perception of NE states is rugged sincere, it scores low in competence which means the respondents do not consider the facilities and infrastructure in NE states enough to provide them a memorable experience.</p> <p>Based on the analysis, while the advertisement campaigns can be designed on the parameters of ruggedness and sincerity, competence of the region can be improved by improving the infrastructure and experience to the adventure tourists.</p> <p>Recommendations for making improvements in soft and hard infrastructure</p> <ul style="list-style-type: none"> • Skill Development in Technical Areas like Pilot, Rafters etc. through institutes like NIMAS and IHCAE <ul style="list-style-type: none"> • Based on the survey undertaken by EY, tourists are not confident about receiving services that are reliable, prompt and responsive from the competent institutions. Hence, skills need to be developed among the local people • Skilling in the areas of Trekking, Culinary, Kayaking, Rafting, Paragliding, Jungle trek, Angling, Bird Watching, Medicinal plants etc. can be developed • Based on the interest of tourists and popularity of adventure sports, state tourism departments can identify five focus adventure sports • State Governments with the support of NEC and other funding agencies in the region can identify candidates for such trainings and train them • The estimated budget for training 20 students in five adventure sports is about INR 60 Lakhs for one state and INR 4.8 Crores for the region. The detailed breakup of estimated budget has been provided in Section 6.3 • Capacity building of locals in the fields related to hospitality management. • Provide support to entrepreneurs in Adventure Sports activities for local economic development.

Strategic Recommendations	Strategies for implementation of recommendations
	<ul style="list-style-type: none"> „ Building physical infrastructure including adventure sports gears etc. „ Marketing Initiatives <ul style="list-style-type: none"> „ As per the survey conducted by EY, around 30% of the respondents are not aware of the availability of adventure sports activities in the North Eastern States „ State Governments can run advertisement campaigns highlighting the beauty and adventure offered by the state on social media websites like YouTube which is cost effective and provides wide reach „ To achieve wider reach, long term and short term marketing campaign may be launched. Activities under both long term and short term marketing campaign are provided in Section 6.3 „ Tentative budget outlay have also been provided for various marketing activities such as engagement of marketing agency, You Tube advertisements and print media advertisements <p>EY has also defined roles and responsibilities of various stakeholders to promote Adventure Sports activities in NE region.</p>
<p>Generating Funds: Major Funding Avenues to Achieve Excellence</p>	<p>Lack of funds is cited as one of the prime reason for lack of sports development in this region. To mitigate this issue, the EY team has looked into three major resources which can be tapped into for funding of various sports-related activities. These are:</p> <p>Corporation Social Responsibility</p> <ul style="list-style-type: none"> „ As per the Companies Act, 2013, companies having a net worth of INR 500 Crore or more, or a turnover of INR 1000 Cr. or more, or a net profit of INR 5 Crore or more in a given financial year are required to spend 2 percent of their profits on CSR programmes. „ In 2014-15, 14944 companies shelled out INR 9,565 Crore and in 2015-16, 19184 companies shelled our INR 13,828 Crore under the CSR mandate „ One of the areas in which companies can spend their fund is sports development „ Currently, very few companies invest in NER under sports development and hence there is scope for stakeholders to generate fund under CSR „ Some of the potential areas of intervention along with companies which can be approached are provided in Section 6.4 <p>Crowd Funding</p> <ul style="list-style-type: none"> „ Crowd Funding is the practice of funding a project or venture by raising small amounts of money from a large number of people „ In 2014 Sochi Olympics, various athletes and teams turned to crowd funding to help them take part in games „ In India, such initiatives are very common in social sectors but not in sports sector and most of the athletes/ teams depend largely on government funds to train, travel and compete „ It is proposed to launch a portal under which crowdfunding can be sought from the general public for development of sports in North East India including athlete development <p>Leveraging Central Government and NEC Schemes</p> <ul style="list-style-type: none"> „ Department of Sports, Government of India has about 25 schemes under three broad areas viz. Development of Sports Institutions,

Strategic Recommendations	Strategies for implementation of recommendations
	<p>Encouragement and Awards to Sportspersons and Khelo India: National Programme for Development of Sports</p> <ul style="list-style-type: none"> • North East Council (NEC) also has about 10 schemes for the development of sports in the region • It is recommended that state governments should leverage these schemes for various sports development activities such as infrastructure development, athlete development, coach development, award to meritorious athletes etc. • List of various schemes of Govt. of India and NEC has been provided, as annexure, which can be leveraged by the respective state governments.
<p>PPP Interventions in Sports: The Future of Sports Sector</p>	<p>Limited funding avenues for sports through Government funds and the need of improving utilization of existing sports infrastructure make a strong case for roping in private sector in the sports sector. Public-private partnership can be implemented through the following steps:</p> <ul style="list-style-type: none"> • Preparation of PPP Policy • Dedicated PPP Cell to support private players • Expert engagement • Establishment of SPVs <p>Private sector participation can be encouraged to promote sports and improve livelihood options for athletes in the North Eastern region in 3 different areas as mentioned below:</p> <ol style="list-style-type: none"> 1. Operations and management of Sports Academies 2. Construction of Sports Infrastructure 3. Establishment of industries related to sports <p>Under each area of Public-Private partnership as mentioned above EY has identified interventions required to encourage private partners.</p> <p>EY has also defined roles and responsibilities of various stakeholders to promote Public-Private partnership in NE region in sports.</p>
<p>Creating Vibrant Livelihood Ecosystem around Sports</p>	<p>In any sport, the top 3% athletes achieve excellence thereby attracting most of the fame and wealth. The remaining 97% have to struggle for livelihood when their sports career ends. This is why career planning and development of an alternate skill set is vital for every athlete.</p> <p>Many countries such as Australia, USA etc. have taken various initiatives to mentor athletes and provided them a future roadmap. A similar initiative can be launched in the North East with the help of various stakeholders.</p> <p>Sportspersons can be supported for identification and pursue livelihood opportunities through following programs:</p> <p>Athlete Mentorship Programme</p> <p>Some key observations for implementation of Athlete Mentorship Programme include:</p> <ul style="list-style-type: none"> • Collaboration between various sports associations and launch of the similar programmes in association with reputed job agencies. • Setting up of a committee comprising representation from all the states which can oversee the functioning of the programme. • Collaboration with government agencies, PSUs, private players in the region and organize job fairs for ex-athletes. • Collaboration with schools and universities where athletes can complete their education with minimum impact on the training schedule.

Strategic Recommendations	Strategies for implementation of recommendations
	<p>Skill Classification</p> <p>From a skills perspective, the prime skill in sports is that of the athlete. However, there are not one but multiple other skills which feed into various other occupations in the sector. Skills which are directly involved in skilling of an athlete include coaches, journalist, lawyers, medical experts, nutritionists, photographer, physiotherapists and masseurs, psychologists, psychotherapists, referees and umpires, scouts and trainers. Skills which do not directly impact skilling of the athletes but are equally important for sector development include sports journalists, lawyers, match officials, photographers and scouts.</p> <p>EY has listed various job roles identified for sportspersons and key skills required for these job roles to provide opportunities to sportspersons.</p> <p>EY has also defined roles and responsibilities of various stakeholders to support sportspersons in creating livelihood opportunities for them.</p> <p>A detailed study will be required to estimate the budget for starting an Athlete Mentorship Program in the region.</p>
<p>Other recommendations</p>	<p>EY has also identified some observations basis interactions with multiple stakeholders:</p> <ol style="list-style-type: none"> 1. Categorization of Sports Disciplines <ul style="list-style-type: none"> • Category 1-High potential sports • Category 2- Medium potential sports • Category 3- Low potential sports 2. Sports as part of the formal education system <ul style="list-style-type: none"> • Define Sports Syllabus • Integration with the formal education system 3. Broad basing of Sports <ul style="list-style-type: none"> • A focused approach to infrastructure development is required at the Gram Panchayat level, Block level and District level. • Mass physical tests through a battery of tests at school level in collaboration with School Education Department. 4. Robust competition structure <ul style="list-style-type: none"> • Regular sports competitions with fixed schedules • Organization of national and international sporting events in NE states 5. Excellence in Sports <ul style="list-style-type: none"> • Structured training and nurturing programme through Sports Nurseries, Academies and Centers of Excellence 6. Support ecosystem for sports <ul style="list-style-type: none"> • Establishment of Sports Universities • Establishment of Advanced Research Centers 7. Incentive Structure <ul style="list-style-type: none"> • Performance-based reward system • Introduction of schemes on lines of fame “Mid-Day Meal” scheme 8. Clarity of roles and monitoring <ul style="list-style-type: none"> • Clear definition of roles to improve coordination and resolve conflicts amongst various stakeholders • Monitoring of schemes and policy interventions

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