



Strengthening India's sports ecosystem

Status assessment and strategic
improvement plan



October 2026

kpmg.com/in

KPMG. Make the Difference.



Executive summary

India's sports ecosystem has expanded significantly over the past three decades, evolving from a predominantly public-sector model into a broader ecosystem comprising government institutions, sports federations, professional leagues, private academies, technology providers, commercial operators and investors. Increased investment, growing public interest and stronger international performances have created new opportunities for both sporting excellence and economic growth.

Considerable progress has been made in expanding infrastructure, athlete development programmes and grassroots initiatives. However, the critical policy challenge is no longer one of scale alone. The focus must now shift towards outcomes: increasing participation, strengthening athlete pathways, improving governance, enhancing service quality and ensuring that investments translate into sustained sporting and socio-economic impact.

This report assesses the current state of India's sports ecosystem across ten priority areas:

- Governance and professionalisation of sports federations
- Participation and physical literacy
- Sports education and certification
- Talent identification and athlete management
- Mega events and sports tourism
- Sports manufacturing and equipment
- Sports funding and investment

- Sports infrastructure and community access
- Sports science, medicine and innovation
- Sports technology and digital enablement

Each area is evaluated against five common dimensions: ecosystem baseline and coverage, delivery effectiveness, system gaps and root causes, quality of evidence, and implementation readiness.

Drawing on government publications, institutional data and industry research, the report distinguishes reported activity from demonstrated outcomes. It identifies opportunities to strengthen existing programmes, improve coordination across stakeholders, address structural gaps and establish clearer accountability for results.

At its core, this is a strategic systems assessment. Its objective is to support an integrated, evidence-based and outcome-driven approach to sports development, enabling India to build a more inclusive, sustainable and globally competitive sports ecosystem.



Prasanth Shanthakumaran

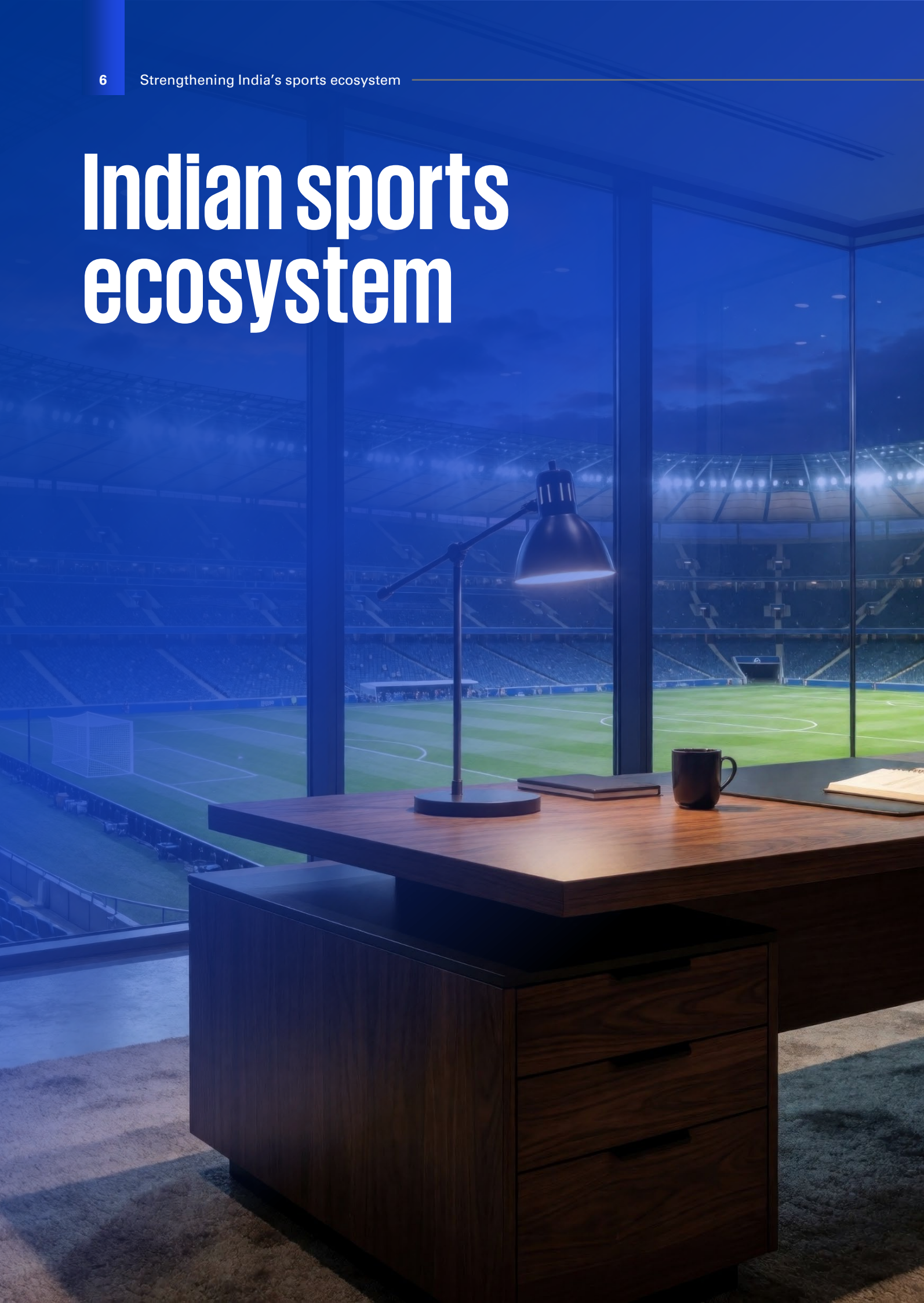
Partner and Head of Sports Sector
KPMG India



Contents

Indian sports ecosystem	06
Ten key focus areas	11
1. National participation and physical literacy measurement	12
2. Governance and professionalisation of sports federations	14
3. Sports manufacturing and equipment industry development	16
4. Sports funding channel enablement	20
5. Sports infrastructure and community access	24
6. Sports technology and digital transformation	28
7. Event hosting, sports tourism and legacy development	32
8. Sports education, certification and human capital development	36
9. Integrated talent identification and athlete management system	40
10. Sports science, sports medicine and innovation ecosystem	42
From diagnosis to delivery	46
Conclusion	51

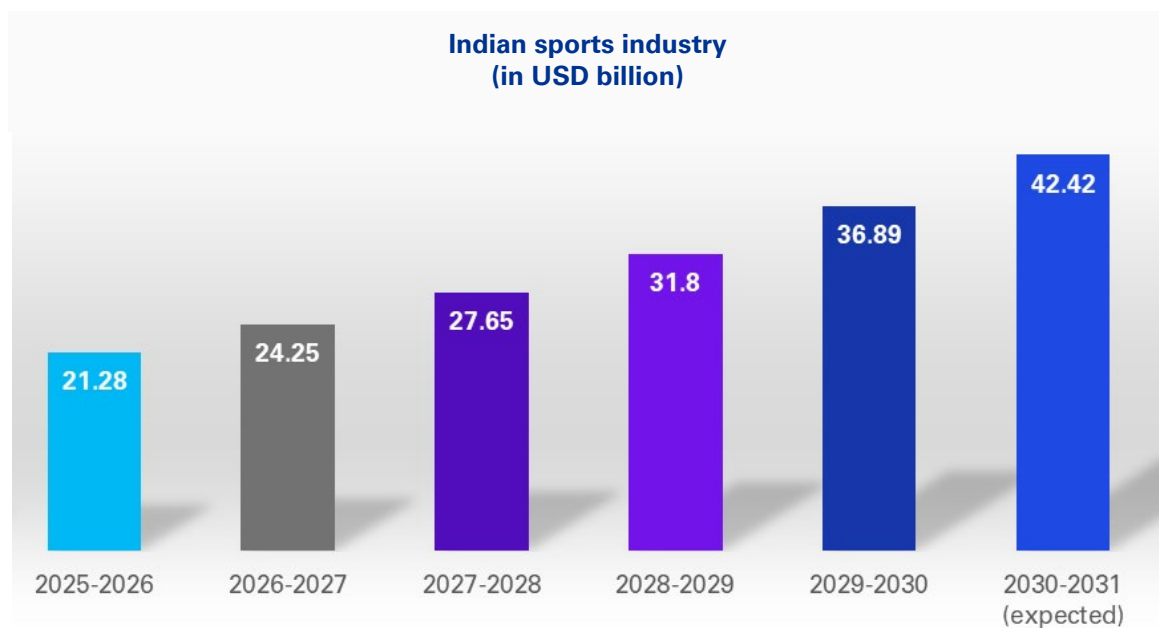
Indian sports ecosystem



Overview: India's sports economy at an inflection point

India's sports industry is transitioning from a cricket-dominated entertainment sector into a structured and investable economic ecosystem. What was historically viewed as a social or recreational activity is increasingly emerging as a strategic growth sector supported by policy reforms, private investments, digital consumption, infrastructure development and a rapidly expanding fan base. The convergence of government initiatives, commercial leagues, sports technology, media monetization, and grassroots participation is laying the foundation for a multi-sport economy with significant economic and social impact.

The Indian sports market is currently estimated at INR 1.99 Lakh Crore (USD 21 billion) for FY26 and growing at an annual rate of 12-14%. This growth reflects a broader shift in consumer behaviour, where sport is no longer limited to passive viewership but is increasingly influencing participation, fitness, lifestyle choices, technology adoption and tourism.



The sports ecosystem encompasses a broad range of interconnected segments, spanning media rights, leagues, infrastructure, grassroots development, manufacturing, technology and athlete services.

A major catalyst behind this transformation has been the development and success of professional leagues. While cricket remains the dominant commercial driver, contributing nearly 75-80% of the sports economy, leagues in Kabaddi, Football, Hockey, Chess, Kho-Kho, Volleyball and women's sports have demonstrated the viability of alternative sporting products. The Indian Premier League (IPL) continues to set benchmarks globally, with an enterprise value of INR 1.97 Lakh Crore (USD 20.6 Billion). Its success has proven that sports can be a scalable commercial asset capable of attracting sponsors, broadcasters, investors and consumers at an unprecedented scale.

Equally important is the emergence of a broad stakeholder ecosystem supporting sports development, with the Ministry of Youth Affairs and Sports allocating INR 4,479.88 crore towards sports development in FY 2026-27. Governments are increasing investments through initiatives such as Khelo India, sports infrastructure programs and governance reforms. The central government's sports allocation has more than doubled over the past decade, while states such as Odisha, Gujarat, Haryana and Tamil Nadu have positioned sports as a key development priority. Simultaneously, broadcasters, digital platforms, corporations, federations, educational institutions and investors are creating new pathways for commercialization and talent development.

The sports ecosystem encompasses a broad range of interconnected segments, spanning media rights, leagues, infrastructure, grassroots development, manufacturing, technology and athlete services.

A major catalyst behind this transformation has been the development and success of professional leagues. While cricket remains the dominant commercial driver, contributing nearly 85% of the sports economy, leagues in Kabaddi, Football, Hockey, Chess, Kho-Kho, Volleyball and women's sports have demonstrated the viability of alternative sporting products. The Indian Premier League (IPL) continues to set benchmarks globally, with an enterprise value of INR 1.97 Lakh Crore (USD 20.6 Billion). Its success has proven that sports can be a scalable commercial asset capable of attracting sponsors, broadcasters, investors and consumers at an unprecedented scale.

Equally important is the emergence of a broad stakeholder ecosystem supporting sports development, with the Ministry of Youth Affairs and Sports allocating INR 4,479.88 crore towards sports development in FY 2026-27. Governments are increasing investments through initiatives such as Khelo India, sports infrastructure programs and governance reforms. The central government's sports allocation has more than doubled over the past decade, while states such as Odisha, Gujarat, Haryana and Tamil Nadu have positioned sports as a key development priority. Simultaneously, broadcasters, digital platforms, corporations, federations, educational institutions and investors are creating new pathways for commercialization and talent development.

The sports industry: A 16 sub-sector economic ecosystem

India's sports economy extends far beyond leagues and live events. It comprises a diverse network of stakeholders and industries that collectively contribute to the sector's growth and commercialization. At its core are government departments and governing bodies, which drive policy, regulation, talent development, and infrastructure investments. Alongside them, sports leagues, clubs and event organizers create competitive platforms that engage athletes, fans, sponsors and broadcasters. Sports sponsorship and marketing crossed USD 1.95 billion (INR 18,525 crore) in 2024, driven predominantly by

cricket but increasingly supported by emerging sports. India also benefits from a fan base of more than 650 million people, creating one of the world's largest opportunities for sports monetization through digital platforms, content consumption and fan engagement.

The ecosystem is further supported by key commercial sectors including media and broadcasting, sports manufacturing, infrastructure development, corporates, and private equity/venture capital investors, which collectively drive revenue generation, asset creation, and industry expansion. Emerging segments such as sports technology, esports, sports education, athlete services, sports tourism and Global Capability Centres (GCCs) are creating new opportunities for innovation, employment, fan engagement and international investment. Together, these sub-sectors are transforming sport from a standalone entertainment product into an integrated economic ecosystem with significant social and commercial impact.

Technology is becoming another defining pillar of growth. India's sports technology segment has expanded into areas such as data analytics, wearables, esports, fan engagement platforms, gaming, artificial intelligence and performance optimization. The sector is enabling sports organizations to engage fans more effectively while improving athlete performance. At the same time, India is emerging as a destination for sports-focused Global Capability Centres (GCCs), supporting global sports organisations through analytics, digital commerce and technology operations.

Key growth drivers and future outlook

The next phase of India's sports economy will be shaped by its ability to diversify revenues beyond cricket and create sustainable value across multiple sports. Several structural developments indicate that this transition is already underway.

Government-led reforms are improving governance, transparency, infrastructure creation and athlete development. More than 1,000 Khelo India Centres (KICs) and over 100 Sports Authority of India (SAI) centres are operational, strengthening grassroots pathways and talent identification. Additionally, hundreds of infrastructure projects have been sanctioned nationwide to support both participation and elite performance.

Manufacturing is another area of strategic significance as India's sports goods and apparel industry ambitions to become a global manufacturing hub through exports, innovation and policy support. Established clusters such as Meerut and Jalandhar continue to play a central role in supplying sports equipment globally, while rising domestic demand from fitness and organized sports participation is further expanding market potential.

The growing influence of women's sports represents another transformative opportunity. The commercial success of the Women's Premier League (WPL), increasing sponsorship commitments and higher visibility for women athletes are helping reshape sports consumption patterns. This not only broadens fan engagement but also unlocks new revenue streams for brands, broadcasters and sports organisations.

Sports participation is also becoming a lifestyle-driven phenomenon. Marathons, cycling events, amateur tournaments and recreational sports

facilities are creating a larger sports participation economy that complements professional sports.

Similarly, sports tourism, events, wellness, fitness and athlete services are emerging as meaningful contributors to economic activity. Together, these sectors are helping position sports as a driver of employment, entrepreneurship, and community engagement.

Looking ahead, India's opportunity extends beyond becoming a larger sports market to evolving into a globally recognized sports economy. Strong demographics, rising digital adoption, supportive government policies, infrastructure investments and growing private-sector participation are creating a unique platform for sustained growth. Continued investments in grassroots development, technology, women's sports, infrastructure, and emerging leagues can help India transition from a predominantly cricket-driven market to one of the world's most dynamic and diversified multi-sport ecosystems.



Sub-sectors in sports

Central & State
departments



Governing
bodies



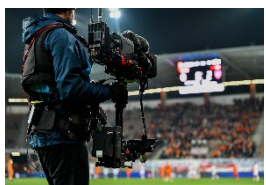
Sports
Leagues



Sports Clubs



Media



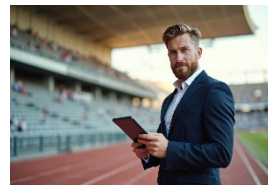
Sports
manufacturing



Sports
infrastructure



PE/VC



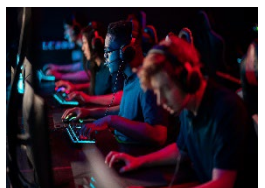
Corporates



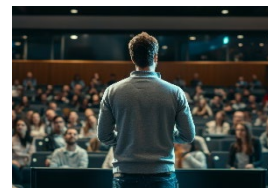
Sports
technology



Esports



Sports
education



Events



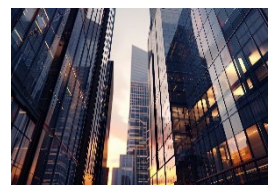
Sports
tourism



Athlete
economy

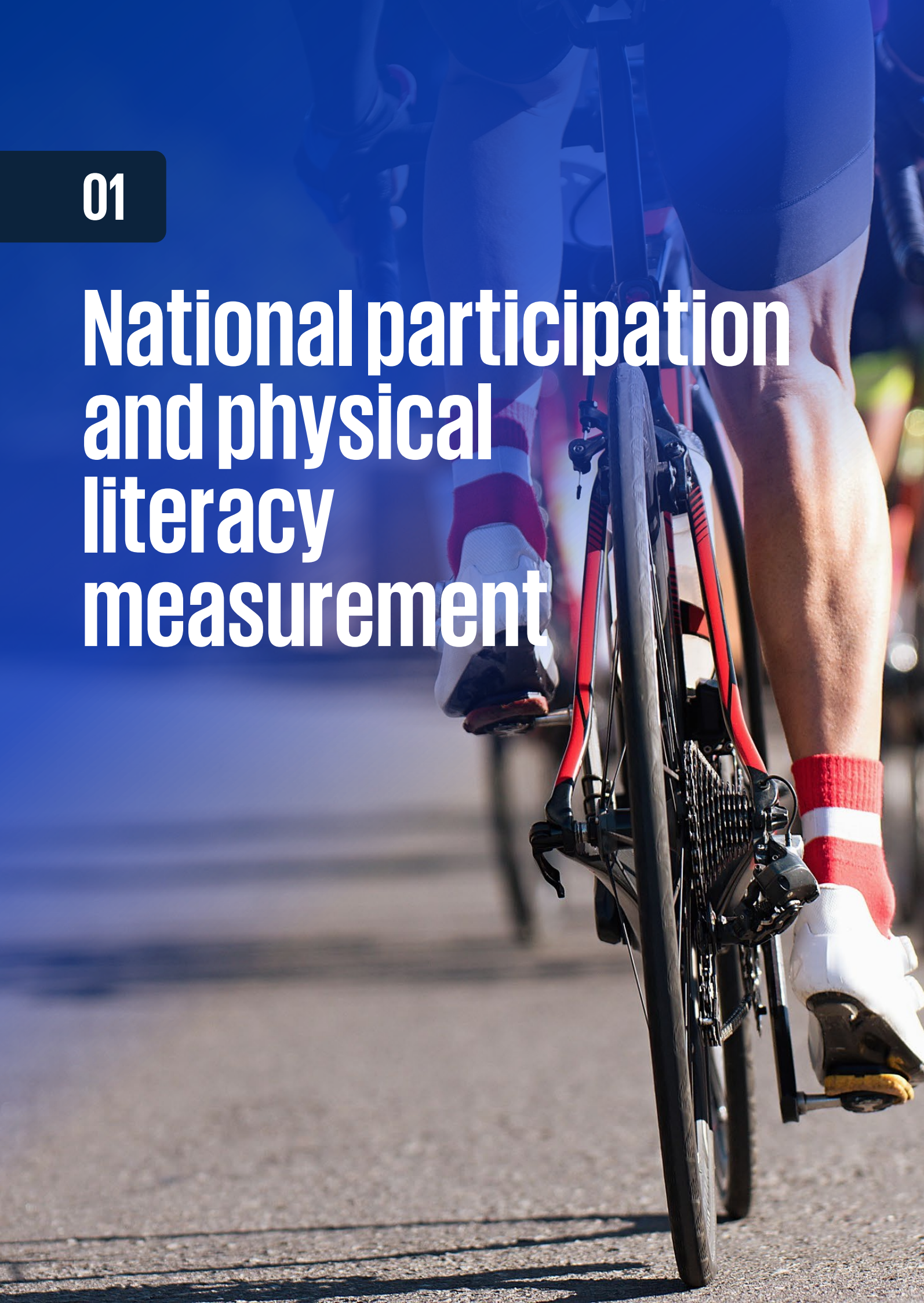


GCCs



Ten key focus areas





01

National participation and physical literacy measurement

A high-performing sports system should be measured not only by medals but also by how many people participate regularly in physical activity and develop physical literacy. Broad-based participation improves public health, social inclusion, and creates the talent pool for future elite athletes. The focus should therefore be on measuring sustained engagement, physical competence, inclusion, and progression rather than one-time participation.

Current state

Government initiatives such as Khelo India have expanded grassroots competitions, talent identification, and community participation. Growing private investment in sports facilities, academies, leagues, and digital platforms has further increased access, particularly in urban areas. However, existing measures largely track programme outputs, infrastructure creation, and event participation rather than regular physical activity, retention, or inclusion.

Key challenges

- No consistent national measure of regular sports and physical activity participation
- Lack of common definitions and reporting standards across programmes and states
- Limited visibility on inclusion, retention, affordability, accessibility, and gender participation
- Physical literacy and movement skills remain under-measured.

Recommended actions

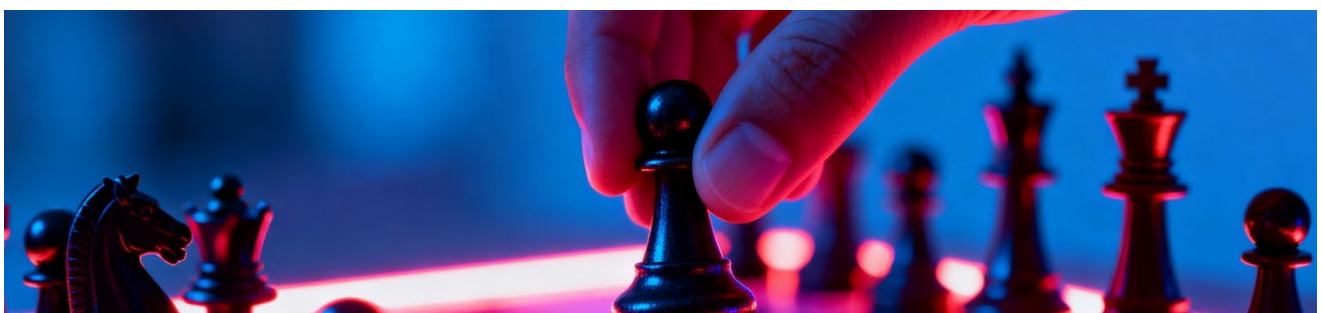
- National participation and physical literacy framework: Establish common definitions and metrics for participation, retention, inclusion, and physical literacy
- Measure regular participation: Track frequency, duration, retention, and progression into organised sport rather than one-time engagement
- Physical literacy assessment: Introduce age-appropriate assessments in schools focused on development, not selection
- National participation survey: Conduct periodic surveys to measure sports and physical activity participation across population groups
- Improve local reporting: Standardise participation reporting across states and districts
- Prioritise inclusion: Set specific participation targets for women, persons with disabilities, rural populations, and underserved communities.

Implementation approach

Build on existing data collected through Khelo India, schools, local bodies, and state programmes rather than creating a new standalone system. Pilot the framework in selected districts before national rollout. Success should be measured through participation rates, activity frequency, retention, and inclusion, not just total participant numbers.

Strategic outcome

The objective is to create a reliable national evidence base that measures whether people are regularly active, physically literate, and able to access sport throughout life. This will help improve policy, target investment more effectively, strengthen public health outcomes, and expand the future athlete pipeline.



02

Governance and professionalisation of sports federations



The professionalisation of National Sports Federations (NSFs) should focus on effective implementation of the National Sports Governance Act, 2025, moving beyond compliance to build organisations that can govern sport, support athletes, and deliver performance outcomes. Federations are critical to athlete pathways, competitions, coaching systems, safeguarding, and international participation. The objective is to combine strong governance, professional management, and technical excellence.

Current state

Government support to NSFs has increased, while the NSF Portal has improved transparency through digitised processes covering recognition, elections, compliance, athlete selection, and planning. However, professionalisation remains uneven across federations. Governance reforms have not always translated into stronger athlete services, technical capability, or accountability. The new Act provides an opportunity to strengthen governance, ethics, athlete welfare, and institutional performance.

Key challenges

- Significant variation exists in federation capacity, resources, and professional management
- Compliance requirements can divert attention from athlete development and technical planning
- Governance compliance does not necessarily lead to stronger performance systems or athlete outcomes
- Links between institutional performance and sporting results remain weak.

Recommended actions

- **Federation capability framework:** Define minimum standards across governance, finance, safeguarding, athlete services, technical planning, and data management, supported by periodic assessments
- **Link governance to performance:** Introduce annual performance agreements combining compliance, participation, athlete development, and performance targets
- **Strengthen digital monitoring:** Expand the NSF portal into a performance and compliance management platform
- **Promote professional management:** Separate board oversight from day-to-day operations and encourage appointment of qualified professional executives
- **Provide shared services:** Offer legal, financial, procurement, safeguarding, and compliance support for smaller federations
- **Improve athlete-centric governance:** Strengthen transparent selection systems, grievance mechanisms, safeguarding, and athlete representation
- **Build leadership capacity:** Develop structured programmes for federation leaders, technical directors, and high-performance managers.

Implementation approach

Adopt common standards for governance, ethics, and safeguarding while allowing organisational models to reflect the size and complexity of each sport. Federations should undertake capability assessments and implement time-bound development plans, with government support increasingly aligned to institutional improvement and performance outcomes.

Strategic outcome

The goal is not larger bureaucracies but high-performing, accountable, and athlete-focused federations that ensure public investment in sport translates into better governance, stronger institutions, and improved sporting outcomes.

03

Sports manufacturing and equipment industry development



The sports equipment industry offers a major opportunity to link sports development with manufacturing, jobs, innovation, and exports. As participation, infrastructure, and high-performance sport grow, India can strengthen its position across the sports manufacturing value chain. The focus should be on building a globally competitive industry that serves both domestic demand and export markets.

Current state

- India has a strong sports manufacturing base, led by established clusters such as Jalandhar and Meerut
- Rising participation, fitness awareness, and sports infrastructure are expanding domestic demand
- Policymakers increasingly recognise sports manufacturing as a driver of industrial growth, employment, and exports
- Despite its manufacturing base, India remains a relatively small player in global sports equipment exports, highlighting significant growth potential.

Key challenges

- Many firms are SMEs with limited capabilities in advanced materials, design, automation, testing, and product development
- Gaps in quality standards, certification, and testing infrastructure constrain access to higher-value export markets
- Innovation and R&D remain uneven, particularly in emerging areas such as smart equipment, wearables, and adaptive sports products
- Smaller manufacturers face challenges in branding, market access, distribution, and export development
- Links between manufacturers, athletes, coaches, federations, and sports scientists remain underdeveloped, limiting product innovation.

Recommended actions

Strengthen manufacturing clusters

- Establish targeted cluster-upgradation programmes for key production centres such as Jalandhar, Meerut, and emerging manufacturing hubs
- Develop shared facilities for testing, certification, design, prototyping, and quality assurance
- Improve access to modern manufacturing technologies and productivity-enhancing tools.

Promote innovation and research

- Encourage research and development in advanced materials, performance equipment, wearable devices, adaptive sports technologies, sports analytics hardware, and smart fitness products
- Support industry-academic collaboration to accelerate innovation and commercialisation
- Create innovation challenges and pilot programmes linked to athlete and consumer needs.

Build stronger industry-sport linkages

- Connect manufacturers with SAI centres, the National Sports University, federations, academies, athletes, and sports-science institutions
- Use athlete feedback and field testing to improve product design and performance
- Encourage collaborative product-development programmes focused on Indian sporting conditions and user requirements

Support MSME competitiveness

- Provide export-readiness support covering international standards, certification requirements, branding, market intelligence, and buyer engagement
- Facilitate participation in international trade fairs and industry exhibitions
- Develop common services that allow smaller firms to access facilities and expertise that would be difficult to finance independently.

Recommended actions

Improve standards and quality assurance

- Establish transparent quality and safety standards across product categories
- Expand testing and certification infrastructure to support compliance with domestic and international requirements
- Encourage adoption of internationally recognised quality-management systems.

Leverage public procurement

- Use transparent procurement frameworks that reward quality, performance, and value for money
- Create opportunities for qualified domestic firms to compete in supplying equipment to publicly funded programmes, institutions, and facilities
- Maintain open and competitive processes while supporting capability development within domestic industry.

Implementation approach

The sector's export ambitions should be translated into targeted product-level strategies rather than broad industry-wide goals. Policymakers should identify priority product categories where India can develop competitive advantages and concentrate support accordingly.

A structured assessment should be undertaken to:

- Map existing manufacturing capabilities
- Identify quality and technology gaps
- Benchmark international competitors

- Assess export opportunities by product category.

Determine where shared infrastructure and technology support can generate the greatest return.

Different segments of the sports economy may require different policy approaches. Sports equipment, apparel, footwear, fitness devices, sports technology, and adaptive equipment each have distinct value chains, certification requirements, innovation needs, and export opportunities. Policy interventions should therefore reflect the characteristics of each segment rather than applying a uniform approach across the industry.

Suggested monitoring indicators

Industry growth and competitiveness

- Sports equipment exports and share of global exports
- Growth in domestic manufacturing output
- Domestic value addition across priority product categories
- Export-market diversification and number of destination markets served.

Innovation and quality

- Number of firms meeting relevant international quality and safety standards
- Utilisation of testing, certification, and design facilities
- Research and development expenditure within the sector
- New products developed through industry-athlete or industry-institution collaborations.

Cluster development

- Number of firms participating in cluster-upgradation programmes
- Productivity improvements within supported manufacturing clusters
- Adoption of advanced manufacturing technologies and processes.

Employment and economic impact

- Direct and indirect employment generated
- Workforce productivity indicators
- Growth in skilled manufacturing and product-development roles
- Contribution of sports manufacturing to the broader sports economy.

Strategic outcome

The objective is to transform India's established manufacturing base into a more innovative, technology-enabled, and globally competitive sports industry. By strengthening quality, design capabilities, standards compliance, research and development, and export readiness, India can move beyond low-value manufacturing towards higher-value products and international market

leadership. At the same time, a stronger domestic manufacturing ecosystem can improve the availability, quality, and affordability of sports equipment for Indian athletes, schools, communities, and high-performance programmes, creating benefits across the entire sporting ecosystem.

04

Sports funding channel enablement



Public funding will remain the foundation of India's sports ecosystem, particularly for participation, athlete development, infrastructure, and other public-interest objectives. However, achieving long-term sporting ambitions will require a more diversified funding base that combines government investment with CSR, sponsorship, philanthropy, league revenues, and private capital. The goal is not just to raise more funding, but to align each funding source with the areas it is best suited to support.

Current state

Government investment in sport has increased significantly over the past decade through programmes such as Khelo India. At the same time, the National Sports Development Fund (NSDF), sports Corporate Social Responsibility (CSR) initiatives, sponsorships, and private investments have created additional funding channels. While interest from corporates and private investors is growing, sports still accounts for a relatively small share of CSR spending and funding remains concentrated in a limited number of sports, geographies, and institutions. The overall funding landscape remains fragmented, with uneven project-development capacity across the sector.

Key challenges

- Different funding sources have varying objectives, return expectations, and time horizons, often resulting in fragmented investments
- Limited visibility on fund utilisation, outcomes, and long-term impact
- Private investment is concentrated in high-visibility sports, while grassroots sport, women's sport, para-sport, and community programmes face funding gaps
- Many sports organisations lack the capability to develop investment-ready projects
- Funding decisions often focus on capital expenditure without adequately planning for operating and maintenance costs.

Recommended actions

Develop a national sports funding architecture

- Map funding sources against strategic priorities including participation, athlete development, infrastructure, major events, manufacturing, research, and innovation
- Clarify the roles most suited to public funding, CSR, sponsorship, philanthropy, and private investment.

Create a national sports project pipeline

- Develop a structured portfolio of projects with clearly defined objectives, beneficiaries, timelines, budgets, implementation arrangements, and outcome measures
- Improve visibility of investment opportunities across the sports ecosystem.

Promote multi-year funding commitments

- Encourage longer-term CSR, sponsorship, and philanthropic partnerships where continuity is critical to achieving outcomes.

- Support funding models aligned with athlete-development cycles, infrastructure utilisation, and community programmes.

Strengthen the national sports development fund

- Enhance project-development capabilities within the NSDF ecosystem
- Increase awareness and accessibility for corporate, philanthropic, and individual contributors
- Position the fund as a stronger platform for co-investment and partnership development.

Establish common outcome frameworks

- Develop consistent but proportionate impact-measurement principles for sports CSR, sponsorship, and philanthropic investments
- Focus on outcomes while allowing flexibility for different project types.

Recommended actions

Expand blended financing models

- Explore public-private partnership and blended-finance approaches for sports infrastructure and community facilities
- Ensure affordability, accessibility, and public-interest objectives remain protected.

Build project development capacity

- Support federations, community organisations, and local institutions in preparing investment-ready proposals
- Provide guidance on financial planning, governance, monitoring, evaluation, and reporting.

Implementation approach

A national sports funding pipeline should go beyond a list of funding opportunities. Projects should have clear ownership, governance, delivery plans, funding needs, and long-term sustainability models.

Government should act as an enabler and convenor by identifying priority investment areas, standardising project-development frameworks,

and promoting transparent reporting. This can reduce due-diligence costs and improve investor confidence.

Funding decisions should assess the full project lifecycle including capital, operations, maintenance, monitoring, and sustainability, particularly for infrastructure, athlete-support programmes, and community sports initiatives.



Suggested monitoring indicators

Funding diversity and sustainability

- Share of CSR and sponsorship funding committed for periods exceeding one year
- Ratio of private funding mobilised alongside public investment
- Growth in philanthropic and non-government contributions to sport
- Number of blended-finance and public-private initiatives implemented

Equity and inclusion

- Share of private funding directed towards grassroots participation
- Funding allocated to women's sport, para-sport, and less-commercial disciplines
- Geographic distribution of non-government sports investment.

Project quality and outcomes

- Share of funded projects with clearly defined baseline and outcome measures

- Completion rates of funded projects against planned objectives
- Independent evaluation and reporting coverage.

Operational sustainability

- Financial sustainability of supported facilities and programmes
- Continuity of programmes following the conclusion of initial funding
- Long-term utilisation of funded infrastructure and assets.

Sector development

- Number of organisations supported in project preparation and fundraising
- Growth in private-sector participation across the sports ecosystem
- Mobilisation of additional capital through structured funding platforms.

Strategic outcome

The objective is not to transfer public responsibilities to corporate or private actors, but to create a more coordinated and sustainable funding ecosystem that maximises the impact of every rupee invested in sport. By aligning funding sources with appropriate uses, strengthening project quality, and encouraging longer-term

partnerships, India can improve the effectiveness, durability, and reach of sports investment. A more diversified funding architecture would support participation, athlete development, infrastructure, innovation, and inclusion, while helping build a stronger and more resilient sports ecosystem for the future.



05

Sports infrastructure and community access



India has significantly expanded sports infrastructure through SAI, Khelo India, state programmes, educational institutions, and private operators. The challenge is no longer just building facilities, but ensuring they are accessible, affordable, well-managed, maintained, and actively used. Infrastructure should be treated as a long-term public service, with equal emphasis on utilisation, programming, and maintenance.

Current state

- Khelo India and SAI have created an extensive network of sports facilities, training centres, and athlete-development hubs
- Private academies, pay-and-play facilities, commercial sports complexes, and educational institutions now form an important part of the sports infrastructure ecosystem
- Schools and colleges hold significant sports assets that could be better utilised through community access and shared-use models
- Digital booking platforms and professionally managed facilities have increased access, particularly in urban areas.

Key challenges

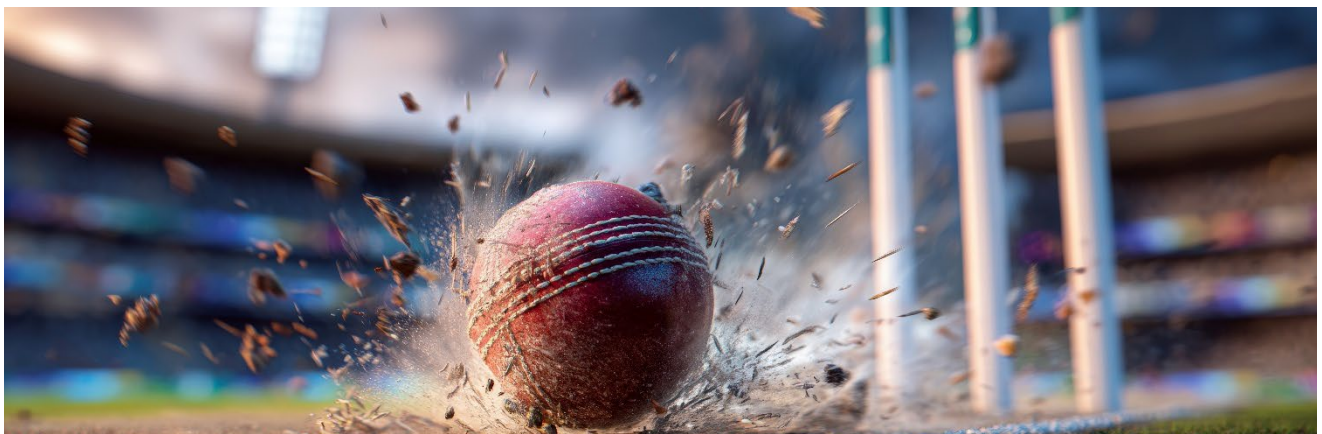
- Lack of a comprehensive national view of facility location, condition, utilisation, staffing, accessibility, and operating costs
- Underutilisation due to inadequate coaching, competitions, staffing, maintenance, or community programming
- Access barriers related to affordability, booking systems, operating hours, safety, and inclusion for women and persons with disabilities
- Weak operating and maintenance models that affect long-term sustainability
- Infrastructure planning often focuses on new construction instead of maximising existing school, university, and private facilities.

Strategic focus

- Shift from asset creation to service delivery and utilisation
- Develop a national infrastructure inventory and utilisation framework
- Improve community access, shared-use arrangements, and operating models
- Require maintenance, staffing, and programming plans for new facilities
- Prioritise refurbishment and optimisation of existing assets before building new ones
- Plan infrastructure as integrated district-level networks linked to participation and athlete-development pathways.

Strategic outcome

A sports infrastructure system that maximises utilisation, accessibility, and long-term value, ensuring facilities contribute directly to participation, athlete development, and community sport rather than serving as underused physical assets.



Recommended actions

1. Create a national sports facility registry

- Develop a national registry of public, educational, and private sports facilities
- Capture key data on location, capacity, condition, ownership, accessibility, utilisation, pricing, and operating hours
- Use the registry to inform planning and investment decisions.

2. Introduce facility utilisation and access scorecards

- Measure utilisation, community access, programming, and operating hours
- Assess both performance and accessibility
- Publish utilisation data for publicly funded facilities.

3. Strengthen lifecycle planning

- Require operating, maintenance, staffing, and community-access plans for new projects
- Incorporate long-term financial sustainability into approvals.

4. Improve facility management

- Promote professional facility-management practices
- Train facility managers and venue operators

- Increase programming through leagues, coaching, and school partnerships.

5. Expand community access

- Encourage shared-use models across schools, universities, local bodies, and private operators
- Extend operating hours where feasible
- Introduce transparent and affordable booking and pricing systems.

6. Leverage public-private partnerships

- Use PPP models to improve utilisation, maintenance, and user experience
- Protect affordability and community-access objectives.

7. Align infrastructure with demand

- Base investment decisions on participation levels, local demand, travel distances, talent pathways, and workforce availability
- Prioritise service gaps over new asset creation.

8. Improve public information

- Provide easy access to facility details, bookings, pricing, schedules, and programmes through digital platforms.

Implementation approach

Adopt a district-level infrastructure planning model that considers the combined network of public, educational, and private facilities.

District sports plans should assess:

- Facility coverage and utilisation
- Access gaps and travel times
- Refurbishment and modernisation needs
- Shared-use opportunities
- Facility-management capacity
- Local participation and athlete-development requirements

Strategic focus

Shift from building more facilities to maximising utilisation, accessibility, sustainability, and service delivery.

- The utilisation scorecard should be designed carefully to balance high-performance and community objectives. A facility that is heavily used by a small number of elite athletes may demonstrate strong occupancy but limited public value, while a venue with broad community participation may generate significantly greater social outcomes. Performance indicators should therefore consider both utilisation and accessibility.
- Implementation should begin with the development of a facility registry and pilot utilisation framework before scaling nationally.

Suggested monitoring indicators

Infrastructure availability and planning

- Share of supported facilities included in the national facility registry.
- Share of facilities with current operating, maintenance, and community-access plans.
- Geographic coverage relative to population and participation demand.

Utilisation and access

- Facility utilisation rates.
- Community-access hours as a share of total available hours.
- Number of active users and programme participants.
- Cost per programmed user-hour where data is available.

Inclusion and accessibility

- Facilities meeting accessibility standards for persons with disabilities.

- Facilities providing safe and appropriate access for women and girls.
- Affordability of facility access across different user groups.

Operations and sustainability

- Maintenance compliance rates.
- Facility downtime and service interruptions.
- Financial sustainability of facility operations.
- Professional staffing and management coverage.

Sporting and community outcomes

- Facilities linked to regular school, community, and competition programmes.
- Growth in local participation associated with supported facilities.
- Athlete-development pathways supported through infrastructure networks.
- User satisfaction and repeat utilisation.

Strategic outcome

The goal is to move from viewing sports infrastructure primarily as a construction programme to treating it as an ongoing public service. Success should be measured not by the number of facilities built, but by whether facilities are accessible, well maintained, actively used, and connected to participation and athlete-

development opportunities. A more service-oriented approach to infrastructure planning can maximise the return on public investment, expand community participation, and create stronger foundations for sporting excellence.



06

Sports technology and digital transformation



Technology is a strategic enabler across the sports ecosystem, improving how athletes are identified, developed, monitored, and supported, while enhancing facility operations, competition management, governance, and fan engagement. As India seeks to strengthen both participation and high-performance sport, technology should be viewed not as a standalone sector but as a cross-cutting capability that improves decision-making, service delivery, transparency, and efficiency.

The opportunity extends beyond individual tools such as wearables or analytics platforms. The real potential lies in digital transformation: creating interoperable systems, trusted data foundations, and connected platforms that link athletes, coaches, federations, facilities, healthcare providers, researchers, event organisers, and policymakers.

Current state

- Technology adoption is growing across athlete assessment, wearables, performance analytics, digital coaching, competition management, venue booking, ticketing, streaming, and fan engagement.
- Sports organisations increasingly use digital platforms for athlete registration, scheduling, communication, and performance monitoring.
- A growing sports-tech ecosystem is developing solutions in analytics, virtual coaching, smart equipment, sports commerce, and fan engagement.
- Government initiatives such as the National Sports Repository System (NSRS) and athlete-management systems have established important digital foundations.

Key challenges

- Fragmented platforms and limited interoperability create duplicate data and disconnected athlete records.
- Lack of common standards for data governance, privacy, cybersecurity, and system architecture.
- Uneven adoption due to cost, digital capability, maintenance, and change-management challenges.
- Sports data is often underutilised and not converted into actionable insights.
- Protecting sensitive athlete information requires strong privacy and security safeguards.



Recommended actions

Establish a national sports digital architecture

- Develop a common digital architecture for sports data, platforms, and services
- Define interoperability standards to enable information sharing across federations, academies, SAI centres, schools, events, and athlete-support programmes
- Adopt common standards for privacy, cybersecurity, identity management, and data quality.

Create a national sports data exchange

- Enable authorised sharing of athlete, competition, performance, facility, and programme data through common protocols
- Build on existing digital systems rather than creating parallel platforms
- Reduce duplication in registrations, reporting, and athlete records.

Prioritise high-impact digital use cases

- Focus investment on operational challenges where technology can generate measurable improvements
- Digital athlete profiles and longitudinal performance records
- Ai-enabled talent identification and athlete-development analytics
- Video-based coaching and remote technical assessment
- Digital competition-management systems
- Facility discovery, booking, utilisation tracking, and asset management
- Injury monitoring, rehabilitation tracking, and return-to-play management
- Athlete welfare and support-service coordination
- Data-driven programme monitoring and performance dashboards.

Accelerate adoption of sports technology

- Support deployment of wearable devices, GPS systems, motion analysis tools, performance-tracking platforms, computer vision systems, and digital coaching technologies
- Encourage technology adoption across grassroots, development, and elite pathways
- Promote affordable solutions suitable for schools, community centres, and smaller federations.

Develop a sports-tech innovation ecosystem

- Establish structured partnerships among startups, sports-science institutions, federations, universities, SAI centres, and manufacturers
- Create testing environments where new technologies can be validated under real-world conditions
- Support commercialisation of sports technologies developed in India.

Enable data-driven decision-making

- Use analytics to identify athlete progression trends, injury risks, participation patterns, facility demand, and programme effectiveness
- Deploy ai and predictive analytics to improve planning, scheduling, talent development, and resource allocation
- Integrate decision-support tools within coaching, medical, and administrative environments.

Strengthen digital skills and adoption

- Build digital capabilities among coaches, administrators, facility managers, federation staff, and sports-science professionals
- Incorporate technology literacy into sports education and certification frameworks
- Support change-management programmes to improve technology utilisation.

Implementation approach

Implementation should begin with a focused portfolio of interoperable digital pilots that address clearly defined operational challenges. Rather than pursuing technology for visibility or scale alone, each initiative should be based on a documented problem statement, baseline metrics, user requirements, and measurable outcomes.

Each digital initiative should have:

- A designated product owner
- A designated data owner
- Defined user groups
- Clear governance and accountability arrangements
- Data-sharing and privacy protocols
- User-training plans
- Outcome-based success measures.

Pilot initiatives should be independently assessed based on adoption rates, usability, reliability, security, operating costs, and demonstrated improvements to service quality or performance outcomes. National scaling should occur only after evidence of value has been established.

Importantly, new technology investments should first assess whether existing systems can be integrated or extended before creating additional standalone platforms.

- Adoption of wearable, video-analysis, and athlete-monitoring technologies
- Use of ai-enabled analytics and decision-support tools.

User adoption and capability

- Active users across major digital platforms
- Coach, athlete, and administrator adoption rates
- Digital-skills certifications completed
- User satisfaction and platform utilisation levels.

Innovation and industry development

- Sports-tech startups supported through testing and deployment programmes
- Industry-academic collaborations and technology pilots
- Indigenous sports technologies commercialised
- Research translated into deployed solutions.

Impact and outcomes

- Reduction in administrative effort and processing time
- Improvement in facility utilisation and athlete-service delivery
- Better tracking of athlete progression and welfare
- Evidence of technology informing operational and performance decisions.

Suggested monitoring indicators

Digital transformation

- Share of sports organisations connected through interoperable digital systems
- Share of athletes with verified digital records
- Reduction in duplicate registrations and reporting requirements
- Data completeness, accuracy, and interoperability levels.

Sports technology adoption

- Number of facilities using digital booking and utilisation systems
- Number of federations using digital competition-management platforms

Strategic outcome

The objective is to move from isolated technology projects to a digitally integrated sports ecosystem. Successful digital transformation should make sports systems more efficient, transparent, athlete-centric, and evidence-based. The measure of success will not be the number of applications, platforms, or devices deployed, but whether technology improves participation, athlete development, coaching quality, facility utilisation, governance, and economic value creation. By embedding digital capabilities across the sports ecosystem, India can strengthen both sporting performance and the broader business of sport.

07

Event hosting, sports tourism and legacy development



India has significantly strengthened its event-hosting capabilities through major international events such as the FIFA U-17 Women's World Cup, FIDE Chess Olympiad, MotoGP Bharat and the IOC Session in Mumbai, alongside the growing Khelo India Games ecosystem. The next phase should focus on maximising the economic, tourism, participation and community benefits generated by sports events. Event hosting should therefore be viewed not only as a delivery exercise, but as a catalyst for tourism growth, destination branding, local economic activity, and long-term sports participation.

Current state

India's sports events ecosystem has expanded considerably in scale and diversity. By June 2025, Khelo India had conducted 17 editions across its Games formats, recording over 50,000 athlete participations. The Indian sports events, engagement and tourism segment is estimated at approximately USD3.3 billion, supported by event travel, marathons, adventure sports and venue-led experiences.

Event-level assessments also indicate the potential economic benefits of major competitions. For example, the 2025 Vedanta Delhi Half Marathon was reported to have generated an estimated economic impact of ₹433.88 crore and attracted nearly 40,000 participants. While such estimates are event-specific, they demonstrate the importance of measuring visitor spending, tourism activity, local business participation and post-event utilisation alongside attendance figures.

Key challenges

- Event planning often prioritises operational delivery, venue readiness and broadcast requirements over long-term legacy outcomes
- Economic and tourism impacts are not consistently measured across events, making comparisons difficult
- Venue investments may underperform without sustainable operating models, maintenance plans and post-event programming
- Local business participation, tourism linkages, volunteer development and community engagement are often underutilised
- Attendance figures alone do not provide a complete picture of economic or social impact.

Recommended actions

- Develop a **National Event Legacy Framework** covering tourism, visitor spending, employment, local procurement, participation and venue utilisation
- Require **destination and tourism plans** for major events, integrating venues with transport, accommodation, cultural attractions and local businesses
- Mandate **post-event operating and utilisation plans** for publicly funded venues prior to capital approval
- Establish a **multi-year national sports events calendar** to support repeat tourism, destination marketing and event attraction
- Strengthen the role of **states and cities** in sports tourism development and impact measurement
- Use major events to promote **volunteering, school engagement and community participation**.

Implementation Approach

For major events, establish integrated delivery groups comprising sports bodies, tourism authorities, host governments, venue operators, transport providers, hospitality partners and local businesses. Legacy objectives should be defined at the planning stage and monitored throughout the event lifecycle.

Pilot a common evaluation framework across international events, national championships and participation events before wider adoption.

Suggested Monitoring Indicators

- Visitor nights and tourism expenditure generated
- Local employment and procurement outcomes

- Venue utilisation during the 12-36 months following the event
- Growth in participation, volunteering and community engagement
- Completion of agreed legacy commitments and post-event outcomes.

Strategic Outcome

The objective is to create a sports events ecosystem that delivers lasting value through tourism, economic growth, destination branding, community participation and sustainable venue utilisation. Hosting an event should be regarded not as the end goal, but as the starting point for long-term economic and social legacy.





08

Sports education, certification and human capital development



A strong sports ecosystem depends on strong human capital. While infrastructure and funding create opportunities, outcomes are ultimately driven by the people who deliver sport, including coaches, physical education teachers, referees, administrators, sports scientists, therapists, psychologists, nutritionists, facility managers, and performance analysts. The objective is to build a professional sports workforce supported by recognised standards, quality qualifications, and clear career pathways.

Current state

- India has established key institutions such as Netaji Subhas National Institute of Sports (NSNIS), Lakshmibai National College of Physical Education (LNCPE), and the National Sports University (NSU) to develop coaching, physical education, and sports-science capabilities
- Private and industry-led providers, including International Institute of Sports Management (IISM) and Institute of Sports Science and Technology (ISST), have expanded opportunities in sports management and sports sciences
- Growing collaboration between educational institutions and industry has increased access to specialised sports education programmes
- However, workforce data, qualification standards, and employment outcomes remain fragmented.

Key challenges

- No unified framework for sports workforce qualifications, competency standards, and industry recognition
- Limited career pathways and recognition of prior learning for experienced practitioners
- Growing shortages beyond coaching, particularly in sports science, performance support, facility management, competition operations, and athlete welfare
- Inconsistent Continuing Professional Development (CPD) and safeguarding training
- Limited visibility on the size, distribution, and capabilities of the national sports workforce.

Recommended actions

Establish a National Sports Workforce and Human Capital Framework

- Create a national framework covering coaches, physical education teachers, officials, administrators, facility managers, and specialist athlete-support professionals
- Define clear competency standards across community, development, and high-performance levels.

Standardise learning and assessment outcomes

- Establish minimum learning outcomes, practical assessment requirements, and safeguarding standards applicable across providers
- Allow flexibility for sport-specific technical content and specialisations.

Strengthen continuing professional development

- Introduce continuing professional development requirements for selected certifications

- Establish periodic renewal mechanisms linked to professional practice and ongoing learning.

Recognise existing experience and qualifications

- Develop transparent equivalence and recognition pathways for experienced practitioners and existing qualifications
- Maintain competency standards while facilitating workforce mobility and progression.

Link public investment to workforce standards

- Encourage publicly funded coaching and technical appointments to be aligned with recognised qualifications or approved certification pathways
- Use public investment to strengthen workforce quality across the sports ecosystem.

Recommended actions

Build collaborative delivery models

- Promote partnerships among Sports Authority of India (SAI), the National Sports University, universities, National Sports Federations, state institutions, and credible private providers
- Encourage multiple delivery channels operating against common standards.

Improve Career Visibility

- Publish clear career pathways, qualification requirements, employment opportunities, and progression routes across sports occupations
- Position sport as a credible long-term career and contributor to national human-capital development.

Begin with a national workforce mapping exercise covering workforce numbers, qualifications, training providers, employment outcomes, and regional skill gaps. This should inform long-term workforce planning.

Establish a national competency framework that sets standards while allowing multiple institutions to deliver training and certification. Competencies should be tiered by role:

- Community coaches: Movement skills, safety, inclusion, and participation
- Development coaches: Athlete development, technical coaching, and progression planning
- High-performance professionals: Performance planning, competition analysis, multidisciplinary support, and athlete management
- Administrators and facility managers: Governance, operations, commercial management, and safeguarding.

This approach would create a sustainable talent pipeline while ensuring qualifications remain aligned to practical workforce needs.

Suggested monitoring indicators

- Number of certified sports professionals by role, sport, and state
- Share of workforce completing annual continuing professional development (CPD)
- Availability of qualified personnel across centres, academies, and programmes
- Employer, athlete, and federation satisfaction with workforce quality
- Employment, retention, and career progression of sports professionals
- Regional distribution of workforce and identified skill shortages
- Growth in sports-sector employment and overall sports human-capital capacity.

Strategic outcome

The objective is not simply to produce more certifications. It is to create a stronger pipeline of sports human capital capable of supporting participation, athlete development, governance, facility operations, and high-performance success. A well-structured workforce framework would help ensure that investments in infrastructure and programmes are matched by the skilled professionals required to operate them effectively, safely, and sustainably. By strengthening sports human capital, India can build the institutional capacity necessary to support both lifelong participation and international sporting excellence.



09

Integrated talent identification and athlete management system



Talent identification creates value only when it leads to a structured development pathway. Identifying potential is the starting point; long-term success depends on access to coaching, competition, education support, athlete welfare, sports science, and performance monitoring. As India expands programmes through Khelo India, SAI centres, federations, and academies, the priority is to connect these elements into a seamless athlete-development system.

The objective is twofold:

- Identify talent through fair, age-appropriate, and sport-specific methods.
- Manage athlete development through integrated data, coordinated support, and informed decision-making across an athlete's journey.

Current state

- Programmes such as Khelo India Rising Talent Identification (KIRTI) have introduced more structured approaches to talent identification
- Identified athletes can progress through SAI centres, National Centres of Excellence, Khelo India, and Target Olympic Podium Scheme (TOPS) pathways
- Digital initiatives such as the National Sports Repository System (NSRS) and the proposed Khel Setu platform provide the foundation for integrated athlete records and management
- Together, these initiatives have strengthened India's talent-development ecosystem and created the basis for a connected athlete pathway.

Key challenges

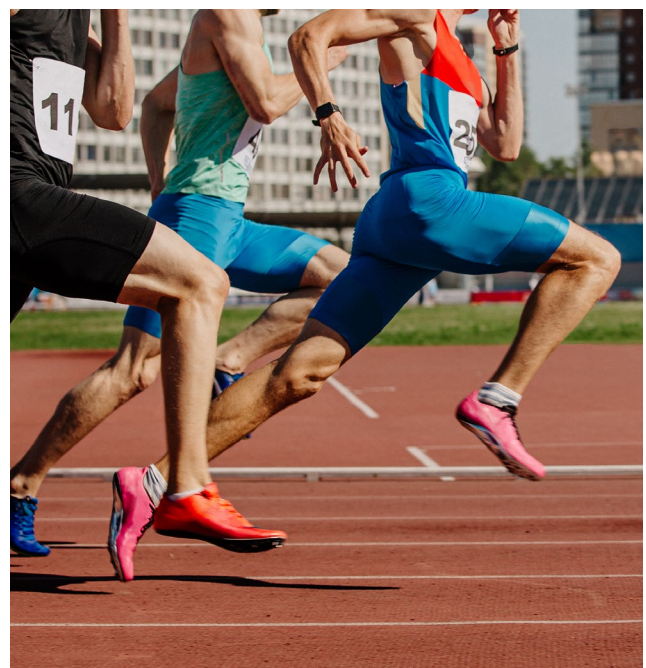
- Talent identification does not always translate into long-term athlete development
- Athlete data and support services remain fragmented across programmes and institutions
- Limited visibility on athlete progression, retention, welfare, and outcomes over time
- Inconsistent coordination between talent identification, coaching, competition, education, and support services
- Risk of focusing on testing volumes rather than athlete progression and development.

Strategic focus

- Create a connected athlete-management system that follows athletes throughout their development journey
- Link talent identification directly to coaching, competition, education, and welfare support
- Establish longitudinal athlete records to improve planning, monitoring, and decision-making
- Focus on progression, retention, welfare, and performance outcomes rather than identification numbers alone.

Strategic outcome

A seamless athlete-development pathway where talented individuals are not only identified but consistently supported, tracked, and developed to maximise participation, retention, wellbeing, and sporting performance.



10

Sports science, sports medicine and innovation ecosystem



Modern sport depends on more than coaching alone. Athlete performance is increasingly shaped by sports science, medicine, nutrition, psychology, recovery, performance analysis, and technology, alongside robust athlete-welfare systems. While India has strengthened these capabilities within elite programmes, the next priority is ensuring that athletes across the development pathway can access appropriate support when needed.

Current state

India has expanded its high-performance support ecosystem through institutions and programmes such as National Centre for Sports Science and Research (NCSSR), SAI National Centres of Excellence (NCOEs), Khelo India, and TOPS. Many elite training environments now provide physiotherapy, strength and conditioning, biomechanics, nutrition, psychology, physiology, and performance-analysis services. Advances in wearables, data analytics, and recovery technologies are also creating new opportunities to enhance athlete development. However, access remains uneven across sports, regions, and competition levels.

Key challenges

- Unequal access to sports science, medicine, nutrition, psychology, and rehabilitation services.
- Lack of a tiered support model and clear referral pathways for athletes outside elite programmes.

- Inconsistent injury tracking, workload management, and return-to-play protocols.
- Limited access to mental-health and athlete-wellbeing services.
- Weak translation of research and innovation into coaching and athlete-support practices.
- Investment in facilities and equipment does not always translate into improved athlete outcomes.

Strategic focus

Build a connected and scalable support ecosystem where athletes can access the right expertise at the right stage of development. Rather than replicating full specialist teams everywhere, priority should be given to common standards, referral networks, athlete-health records, mental-health support, and stronger integration of research, technology, and coaching practice. The ultimate measure of success should be improved athlete health, welfare, development, and performance outcomes.



Recommended actions

1. Establish a tiered national sports science and medicine model

- Develop a three-tier system comprising local screening and referral services, regional specialist centres, and advanced high-performance support environments
- Ensure appropriate access pathways based on athlete needs and performance level
- Optimise resource allocation by concentrating highly specialised expertise where it can serve multiple programmes.

2. Define minimum service standards

- Establish minimum multidisciplinary support standards for publicly funded athlete-development and high-performance programmes
- Define expectations for medical services, physiotherapy, nutrition, strength and conditioning, psychology, and performance analysis.

3. Strengthen referral networks

- Create structured referral pathways linking SAI centres, medical colleges, universities, hospitals, state sports institutions, and qualified private providers
- Ensure timely access to specialist services regardless of athlete location.

4. Improve athlete health management

- Introduce common protocols for injury surveillance, rehabilitation, workload monitoring, medical referral, and return-to-play decisions

- Maintain professional independence in medical decision-making
- Strengthen athlete-health data governance and confidentiality protections.

5. Integrate mental health and athlete welfare

- Provide confidential psychological support services across athlete pathways
- Establish clear referral mechanisms for specialist mental-health support
- Equip coaches and support staff to recognise signs of stress, burnout, and psychological distress.

6. Promote applied research and innovation

- Encourage collaboration among universities, sports-science institutions, federations, manufacturers, athletes, and technology providers
- Support research focused on practical performance challenges and athlete welfare
- Expand testing and validation of sports technologies, equipment, and performance-support tools.

7. Measure service delivery and outcomes

- Monitor service quality, accessibility, referral times, and athlete outcomes rather than focusing solely on infrastructure and equipment
- Evaluate whether sports-science interventions are improving athlete health, performance, and retention.

Implementation approach

Implementation should begin with the creation of a national sports-science and medicine service map. This should identify:

- Sports-science disciplines available at each centre.
- Number and qualifications of professionals.
- Athlete caseloads.
- Referral pathways and waiting times.
- Availability of specialist services by geography.
- Service costs and utilisation levels.

A national mapping exercise should identify service gaps, workforce needs, and opportunities for shared services. In many regions, regional hubs, referral networks, tele-consultation, and mobile services may be more effective than establishing full specialist teams at every facility.

Implementation should prioritise professional independence, athlete consent, confidentiality, and safeguarding, particularly for medical, mental-health, and welfare records.

Innovation and research investments should be tied directly to athlete-development outcomes, ensuring technology and research improve coaching, performance, welfare, and decision-making.

- Rehabilitation and return-to-play outcomes.
- Access to confidential psychological support services.
- Athlete satisfaction with support services.

Workforce capability

- Number of qualified sports-science and sports-medicine professionals.
- Continuing professional development participation rates.
- Distribution of specialist personnel across regions and sports.

Innovation and research

- Applied research projects undertaken with federations, athletes, and coaches.
- Adoption of validated innovations within training and competition environments.
- Industry-academic collaborations and technology pilots.

System effectiveness

- Integration of sports-science data into athlete-management systems.
- Evidence of sports-science inputs informing coaching and performance decisions.
- Improvement in athlete progression, availability, and retention.

Suggested monitoring indicators

Service access and coverage

- Athlete coverage across key sports-science disciplines.
- Availability of services by athlete level and geography.
- Share of athletes with access to tiered referral pathways.
- Specialist referral and waiting times.

Athlete health and welfare

- Injury incidence and recurrence rates.

Strategic outcome

- The objective is to make sports science, sports medicine, and innovation a routine and integrated component of athlete development rather than a specialist service available only to a small group of elite athletes. A tiered and connected ecosystem can improve athlete health, reduce preventable injuries, strengthen performance pathways, and enhance coaching effectiveness. Equally important, it can create stronger links between research, innovation, and field-level practice, ensuring that scientific knowledge translates into better outcomes for athletes across all stages of the sporting pathway.

From diagnosis to delivery

**A national sports
implementation framework**



The ten themes described in this report should be viewed as components of a single delivery system rather than as standalone initiatives. Participation depends on facilities, coaches, and community programming. Talent identification depends on competitions, development pathways, and athlete-management systems. Sports science depends on education, workforce development, and referral networks. Events support tourism and economic activity. Manufacturing and technology contribute to industrial growth. Federations provide the governance and coordination that connect these elements together.

The implementation challenge is therefore not the creation of additional schemes, but the integration of existing investments into a coherent national sports-development framework.

National operating model

A common national delivery framework should be built around five interconnected functions:

1. Standards and governance - Policy direction, accountability frameworks, and minimum standards
2. Programme delivery - Implementation through existing institutions including states, sai, federations, schools, universities, and local bodies
3. Data, technology and service coordination - Interoperable platforms, athlete records,

facility information, and performance reporting

4. Funding and partnerships - Alignment of public funding, CSR, sponsorship, philanthropy, and private investment
5. Measurement, evaluation and learning - Continuous monitoring, outcome assessment, and programme improvement.

The ministry should provide strategic direction and oversee national priorities while preserving the statutory responsibilities of states, federations, SAI, educational institutions, and local authorities.

Immediate priorities

1. Establish a national baseline

- Define common metrics across all ten themes
- Identify data owners and reporting responsibilities
- Establish baseline measures before setting long-term targets.

2. Strengthen institutional capability

- Professionalise federations
- Improve governance standards
- Strengthen coaching, workforce development, and athlete-welfare systems.

3. Connect athlete pathways

- Link participation, competition, talent identification, athlete management, and high-performance programmes

- Ensure athlete progression can be tracked across the development pathway.

4. Improve infrastructure service delivery

- Develop a national facility registry
- Track utilisation, accessibility, maintenance, and programming
- Require operating plans alongside new infrastructure investments.

5. Mobilise sustainable funding

- Establish a transparent pipeline for CSR, sponsorship, philanthropic, and private-sector investment
- Strengthen outcome reporting and project readiness.

6. Support growth sectors

- Encourage event development, sports tourism, manufacturing, technology, and innovation where there is a credible participation, employment, or economic opportunity.

Accountability and sequencing

Every major recommendation should have:

- A lead institution
- Named implementation partners
- Baseline measures
- Time-bound milestones
- Defined completion dates

- Outcome indicators.

Priority should be given to actions that can be implemented through existing programmes and institutional arrangements. More complex reforms involving procurement, structural change, or significant new investment should be sequenced once ownership, capacity, and funding arrangements are clearly established.

Quarterly implementation reviews should focus on delivery risks and bottlenecks, while annual reviews should assess outcomes and reallocate resources where necessary. Major programmes and capital-intensive investments should undergo independent evaluation at least every three years.

National sports outcome dashboard

A concise national dashboard should monitor progress across five dimensions:

Dimension	Core measures
Participation	Regular participation, retention, inclusion
Pathways	Progression from grassroots to competition and elite levels
Service quality	Coaching availability, athlete welfare, specialist support
Asset performance	Facility utilisation, programme delivery, cost efficiency
Economic contribution	Sports manufacturing, events, tourism, employment, private investment

Each indicator should have a clearly defined methodology, owner, reporting frequency, and review process. Where reliable data does not yet exist, establishing a baseline should precede target-setting.

Implementation principle

The overarching principle is simple:

- Do not create a new platform if existing systems can be integrated
- Do not measure talent programmes by testing volumes alone
- Do not evaluate infrastructure solely by construction outputs
- Do not assess funding only by amounts committed

- Do not judge technology by registrations or downloads alone.

Success should be measured by whether resources improve participation, athlete development, service quality, institutional capability, facility utilisation, economic value creation, and long-term sporting outcomes.

The transition from diagnosis to delivery requires disciplined implementation, clear accountability, strong partnerships, and continuous learning. If executed as an integrated system rather than a collection of individual programmes, these ten themes can provide a practical roadmap for strengthening India's sporting ecosystem over the coming decade.

Area	Key objective	Recommended steps
1. National Participation and physical literacy	Increase regular sports participation and physical activity	• Develop national participation and physical literacy framework • Launch periodic national participation survey • Standardise participation metrics across states • Introduce school-level physical literacy assessments • Track retention and inclusion indicators • Focus on women, rural populations and persons with disabilities
2. Governance and professionalisation of sports federations	Build accountable, athlete-centric and professionally managed federations	• Establish federation capability framework • Conduct annual capability assessments • Link funding to governance and performance outcomes • Expand NSF portal into performance-monitoring platform • Introduce professional CEOs and technical directors • Strengthen athlete representation, grievance and safeguarding systems
3. Sports manufacturing and equipment industry	Build a globally competitive sports manufacturing sector	• Upgrade manufacturing clusters (Meerut, Jalandhar, etc.) • Establish testing and certification facilities • Promote R&D and product innovation • Strengthen athlete-industry collaboration • Support MSME export readiness • Introduce quality and standards frameworks
4. Sports funding and investment	Diversify and strengthen sports financing	• Develop national sports funding architecture • Build investable project pipeline • Promote multi-year CSR and sponsorship commitments • Strengthen NSDF as co-investment platform • Develop outcome-based funding frameworks • Encourage PPP and blended-finance models
5. Sports infrastructure and community access	Improve utilisation and accessibility of sports assets	• Create national sports facility registry • Establish utilisation and access scorecards • Introduce lifecycle planning requirements • Promote professional facility management • Expand community and shared-use models • Improve booking, pricing and information transparency

Area	Key objective	Recommended steps
6. Sports technology and digital transformation	Build a connected digital sports ecosystem	• Develop national sports digital architecture • Establish sports data exchange • Create interoperable athlete and competition records • Accelerate adoption of sports technologies • Develop sports-tech innovation ecosystem • Strengthen privacy, cybersecurity and digital capabilities
7. Event hosting, sports tourism and legacy development	Maximise economic and community value of events	• Create national sports events and tourism framework • Standardise impact assessment methodologies • Require legacy planning before event approval • Link events with tourism and destination branding • Strengthen local procurement and SME participation • Monitor post-event facility utilisation
8. Sports education and human capital development	Develop a skilled sports workforce	• Create national sports workforce framework • Standardise certification and competency requirements • Introduce Continuing Professional Development (CPD) • Establish career pathways for coaches and officials • Strengthen industry-academia partnerships • Build workforce data and planning systems
9. Integrated talent identification and athlete management system	Create an integrated athlete development pathway	• Connect talent identification programmes with athlete-support systems • Develop unified athlete-management architecture • Integrate NSRS and khel setu initiatives • Track athlete progression longitudinally • Improve welfare, education and transition support • Use data-driven performance monitoring
10. Sports science, sports medicine and innovation ecosystem	Expand athlete support services beyond elite sport	• Create tiered sports science and medicine network • Define minimum service standards • Strengthen referral pathways • Standardise injury and health management protocols • Integrate mental-health support • Promote applied research and innovation partnerships

Conclusion

Building an integrated and outcome-driven sports ecosystem

India has made substantial progress in expanding sports infrastructure, athlete-development programmes, event-hosting capabilities and institutional support mechanisms. The next phase of sports development requires a shift from measuring inputs and activities toward measuring outcomes and long-term impact. The challenge is no longer simply to invest more, but to ensure that investment translates into higher participation, stronger athlete pathways, better governance, improved service quality and broader economic value.

The ten priority areas outlined in this report should not be viewed as independent interventions. They form an interconnected ecosystem in which governance influences performance, participation feeds talent pathways, infrastructure supports community engagement, science and technology enhance athlete outcomes, and events, manufacturing and investment contribute to economic growth. Sustainable success will depend on how effectively these components are integrated and coordinated.

Three overarching priorities should guide implementation:



Strengthen institutional capability and accountability across federations, delivery agencies and partner organisations.



Create seamless athlete and participant pathways supported by data, technology and high-quality services.



Establish robust measurement and evaluation systems that track outcomes rather than activities.

Success should ultimately be judged by whether more Indians participate in sport, whether athletes progress through transparent and effective pathways, whether facilities are actively used and accessible, and whether sport contributes meaningfully to health, education, employment, tourism, manufacturing and national development.

With disciplined execution, collaborative partnerships and evidence-based decision-making, India can build a sports ecosystem that is inclusive, economically productive and internationally competitive, positioning sport as both a national development priority and a significant contributor to India's long-term growth ambitions.



Kala Anand

Director,
Sports Advisory,
KPMG India

Selected sources and data Notes

- Sports Authority of India (SAI), Key Statistics and scheme-centre information.
- Ministry of Youth Affairs and Sports, annual reports and budget documents.
- Khelo India Dashboard and official Government communications through April 2026.
- National Sports Repository System (NSRS) dashboard.
- National Sports Governance Act, 2025 and NSF Portal.
- Khelo Bharat Niti 2025.
- NITI Aayog, report on realising the export potential of India's sports equipment manufacturing sector, March 2026.
- Press Information Bureau releases on Khelo India, international sporting performance, infrastructure and sports equipment manufacturing.
- Official Olympic and Paralympic performance records.
- KPMG in India, *Sportlight: The Business of Sports in India* (25 September 2025), including market sizing and analysis of participation, events and tourism, manufacturing, CSR, and sports infrastructure.
- WPP Media, *Sporting Nation: Building a Legacy XIII* (March 2026), reporting ₹18,864 crore in recorded sports-economy value for 2025 and 13.4% year-on-year growth.
- CRISIL, *Corporate purpose runs deeper as CSR spending surges 17.5%* (September 2026), including reported sports CSR expenditure for FY2025.
- SSA-Pacta / Sports and Physical Activity Centre, *CSR and Sports in India – The First Decade* (June 2025), reviewing sports CSR trends for 2014–2023.
- Financial Express (October 2026), reporting the estimated economic impact of the 2025 Vedanta Delhi Half Marathon, based on research by Miranda House, University of Delhi.
- International Institute of Sports Management (IISM); Institute of Sports Science and Technology (ISST); IIM Mumbai, sports management programme information.

Data handling notes

- SAI centre and athlete counts reflect the SAI website's listed schemes and reporting date;
- Khelo India Centre, infrastructure project and academy figures are snapshots from Government communication in April 2026 and may change.
- NSRS figures refer to platform-reported records for the stated period.
- Budget allocation, release and expenditure are different measures and should not be used interchangeably.
- The US\$8.1 billion sports-equipment export figure is an identified potential by 2036, not a forecast or guaranteed result.

Acknowledgements

This report was prepared by:

Content:

- Prasanth Shanthakumaran
- Kala Anand
- Venugopal Rajagopalan
- Shamsheer Roka
- Iatsham Jamadar
- Priyanka Acharya

Support (Markets)

- Venkatesh R
- Nisha Fernandes
- Pooja Patel



KPMG in India contacts:

Akhilesh Tuteja
Partner and Head
Clients and Markets
E: atuteja@kpmg.com

Hemant Jhahria
Partner and Head of advisory
E: hemantj@kpmg.com

Nilachal Mishra
Partner and Head
Government and Public Services
E: nilachalmishra@kpmg.com

Prasanth Shanthakumaran
Partner and Head of sports sector
E: prasanths@kpmg.com

Kala Anand
Director, Sports advisory
Sports Advisory & Sports Tech
E: kalaanand2@kpmg.com

kpmg.com/in



Access our latest insights
on KPMG Insights Edge

Follow us on:
kpmg.com/in/socialmedia



The information contained herein is of a general nature and is not intended to address the circumstances of any particular individual or entity. Although we endeavor to provide accurate and timely information, there can be no guarantee that such information is accurate as of the date it is received or that it will continue to be accurate in the future. No one should act on such information without appropriate professional advice after a thorough examination of the particular situation.

The views and opinions expressed herein are those of the quoted third parties and do not necessarily represent the views and opinions of KPMG in India.

KPMG Assurance and Consulting Services LLP, Lodha Excelus, Apollo Mills Compound, NM Joshi Marg, Mahalaxmi, Mumbai – 400 011 Phone: +91 22 3989 6000, Fax: +91 22 3983 6000.

© 2026 KPMG Assurance and Consulting Services LLP, an Indian Limited Liability Partnership and a member firm of the KPMG global organization of independent member firms affiliated with KPMG International Limited, a private English company limited by guarantee. All rights reserved.

Some images in this report have been created using artificial intelligence technology.

This document is for e-communication only. (TL_1026_VR)