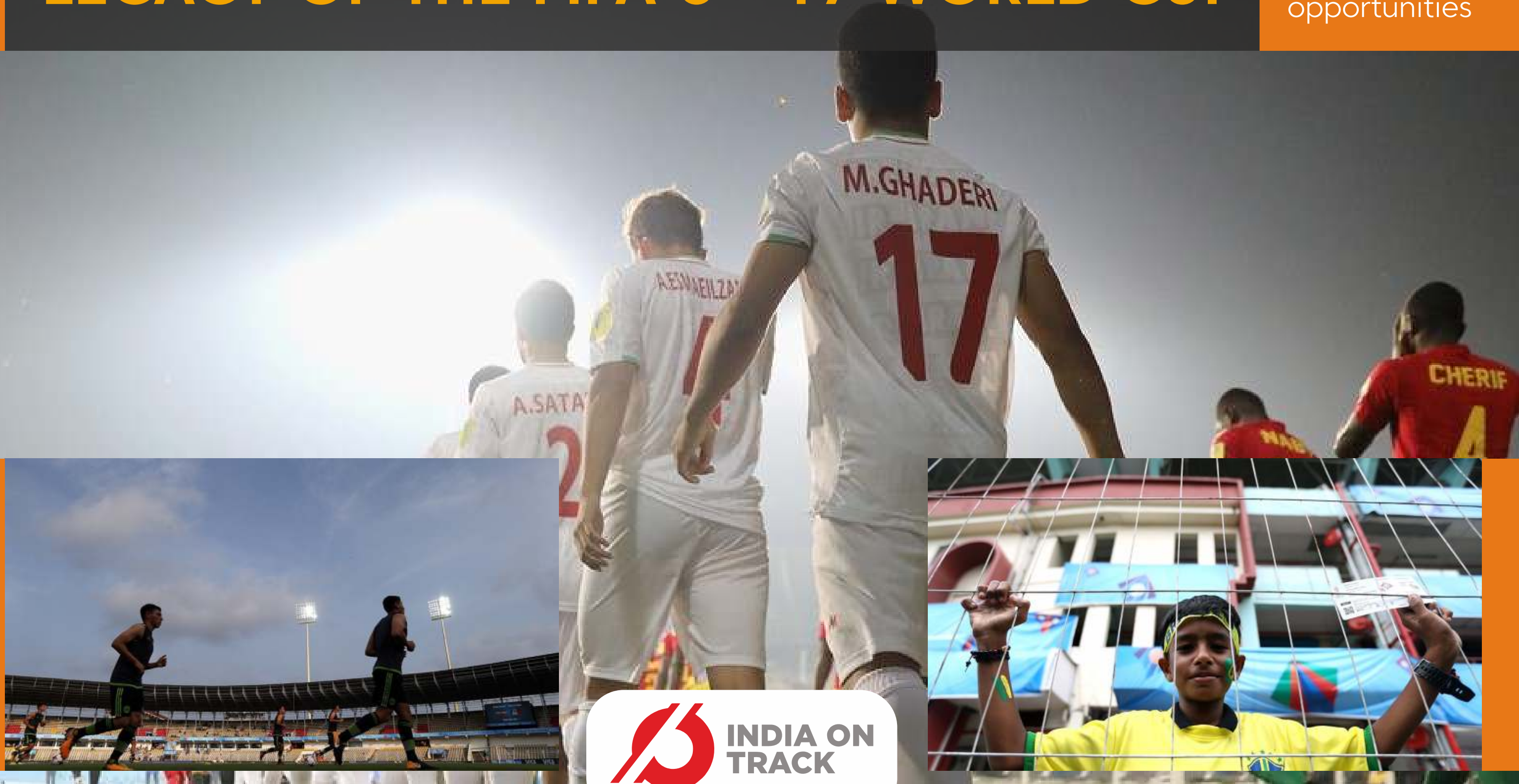


# LEGACY OF THE FIFA U - 17 WORLD CUP

focus on  
new business  
opportunities



# TABLE OF CONTENTS

## LEGACY OF THE FIFA U - 17 WORLD CUP

focus on new business opportunities

### A. INTRODUCTION

A broad discussion on the FIFA U – 17 World Cup, its successes, challenges and what it means for the Indian footballing landscape

### B. IMPACT & KEY TOUCH POINTS

A discussion on the major steps, changes and initiatives undertaken as part of the preparation for the tournament and the key points of impact for the footballing community

### C. BUSINESS OPPORTUNITIES

Based on an assessment of the World Cup's impact on Indian football's landscape, we will attempt to examine the new, relevant and tangible business opportunities, which have arisen in the wake of the tournament's conclusion. What are the key areas of the industry, which are open for intervention and what are the new doors, which have opened as a result of the successful hosting of the tournament

### D. THE ROAD AHEAD

A brief discussion on the road ahead for Indian football, with a focus on hosting major tournaments, their viability, potential legacy and proposed long term impact on the Indian football ecosystem

# FOREWORD

2017 marked a historic year for Indian football. The country firmly established itself on the global football map, with the successful hosting of the FIFA U-17 World Cup in October. The tournament was embraced by the people of India, and went on to break several records, making it the most attended FIFA youth tournament of all time. The response from the stakeholders, including FIFA as well as all the visiting teams was extremely positive and the feedback is a testament to the work done by the Local Organising Committee, all the staff and the volunteers.

On 28th October, the England U-17 team was crowned champions of the tournament, bringing the curtain down on a great event. However, for Indian football, this was the beginning of a long journey ahead. The landscape of the game has changed in India, and we look ahead to exciting and challenging times.

This report attempts to set out the key successes and features of the FIFA U-17 World Cup and the impact it has had on Indian football. It also helps the readers get an insight into the changing dynamic of the football industry in the country and the new opportunities emerging in the wake of the tournament, as part of its legacy.

**Kushal Das**  
**General Secretary**  
**All India Football Federation**



# ACKNOWLEDGEMENT

This is an interesting time for the Indian football industry, and the recent success of the FIFA U-17 World Cup was a good addition to the portfolio of India as a sporting destination. Following on from the tournament, there has been a visible change in perception of football in the country and the various stakeholders of the game have taken note of the same.

The growing popularity of the game provides new and diverse opportunities for entities to grow their presence in football. Stakeholders are beginning to see real value in the sport and for the first time, they see a possible return on the investments made in the football industry.

The Federation of Indian Chambers of Commerce & Industry (FICCI) has always stood for, and believed in promoting and providing support to newer industry sectors. The FICCI Sports Committee is committed to facilitating trade and business opportunities in the thriving Indian sports industry. Football is seen as a key sector by FICCI and we firmly believe that the future holds great things for the football industry in India.

We are pleased to release the report on 'Legacy of the FIFA U – 17 World Cup (Focus on New Business Opportunities)' and are confident that the report will provide a valuable insight into the tournament's success and legacy for the football industry in India.

We express our gratitude to all individuals and organizations that have helped us in compiling this report through their direct and indirect involvement. My special acknowledgement to FICCI, and India On Track.

**Deepak Jacob**  
**President & General Counsel,**  
**STAR India &**  
**Chairman,**  
**FICCI Sports Committee**



# WORLD CUP INDIA 2017

## A. INTRODUCTION





6th December 2013 was a notable day in Indian football, as the FIFA Executive Committee in its meeting at Salvador de Bahia in Brazil, chose to grant India the privilege to host the FIFA U-17 World Cup in 2017. Uzbekistan, Republic of Ireland and Azerbaijan were the other countries in the running to host the tournament.

The tournament was held from October 6th – 28th, at six venues across India. The successful hosting of the tournament marked many important landmarks for India as a sporting, and more importantly, a footballing entity on the global map. Not only was this the first time that India had hosted a FIFA tournament, it has already kick-started conversations around future tournaments being brought here.

While specific numbers and achievements linked to the tournament are discussed in greater detail in this report, some of its most important successes lie in its impact and legacy as far as Indian football is concerned.

In the 4 years leading up to the tournament, several initiatives were undertaken to prepare India to host the

FIFA U – 17 World Cup. Now, in the wake of its successful execution, the tournament has left behind a strong legacy and footprint on the landscape of Indian football.

Local successes include upgrading of key infrastructure, upskilling and training of a large pool of tournament staff as well as adoption and implementation of technical expertise to deliver a world-class event. On a larger global scale, India consolidated its presence as a relevant, solid footballing nation and one, which is capable of executing large-scale global sporting events.

The tournament itself saw several records broken. It recorded the highest attendance for a FIFA Youth World Cup in the history of the tournaments **(1,347,133)**, surpassing the FIFA U - 20 World Cup Colombia 2011 **(1,309,929)**. In fact, the attendance was higher than the marquee ICC Cricket World Cup held in India in 2011.

The success of the tournament also reflected in the eyeballs it attracted. With a cumulative viewership in India of 68 million, the FIFA Under-17 World Cup 2017 garnered the highest viewership among international football tournaments broadcasted in India. The numbers for the tournament rated better than those for the English Premier League and the Spanish league, LaLiga in India. The impact on the heart of Indian football is further emphasised by the fact that the Hindi and Bengali language feeds contributed to around 40% of the overall viewership while 56% of the viewership was from rural India. The finals between England and Spain in Kolkata's Salt Lake stadium, that witnessed a packed house of almost 67,000 fans, generated nation-wide interest, scoring an average 2.2 million impressions.



“ Our efforts towards leveraging and enhancing the popularity of the FIFA U-17 World Cup have yielded excellent results and we hope that this will be a pivotal point for the rise of football in India. We would like to thank FIFA, AIFF and LOC for bringing football's global standards to Indian shores.

”  
**Rajesh Kaul**  
President, Sports and  
Distribution Business  
Sony Pictures Networks India

# TOURNAMENT SUCCESSES

**13,47,133**  
25,906 avg.

## TOURNAMENT ATTENDANCE

most attended FIFA Youth World Cup

larger attendance than ICC World Cup 2011

**45%**

Viewers were Female

**68 MILLION**

Cumulative Viewership in India



**U-17 WORLD CUP**  
**INDIA 2017**

# B. IMPACT & KEY TOUCHPOINTS





## Infrastructure Development and Upgrading

The most visible and tangible change brought about as a result of the World Cup is the significant development and upgrading of tournament venues and facilities. A total of 6 (six) venues were used to host matches during the tournament, with each of the 6 stadia undergoing major renovations to bring them up to par with international venue standards.

In addition to the six stadia undergoing upgradation, major renovations were also undertaken at 26 (twenty six) training facilities across the country. All the stadia and training facilities were brought up to par by making them compliant to standards set by FIFA.

There was strong emphasis on making the facilities athlete friendly, common fan friendly and media friendly. The impact and follow-through provided by the upgraded infrastructure is one of the key takeaways from the tournament. As a result, world-class training

facilities are available to players across India, providing access and opportunity, which did not exist earlier.

## Tournament Venues



**Kolkata**  
**Salt Lake Stadium**  
**Capacity : 66,600**



**Kochi**  
**Jawaharlal Nehru Stadium**  
**Capacity : 41,700**



**New Delhi**  
**Jawaharlal Nehru Stadium**  
**Capacity : 58,000**



**Mumbai**  
**DY Patil Stadium**  
**Capacity : 41,000**



**Guwahati**  
**Indira Gandhi Athletic Stadium**  
**Capacity : 23,800**



**Margao**  
**Fatorda Stadium**  
**Capacity : 16,200**

## Facilities Upgraded (Then & Now)





## Upskilling of Personnel

To enable the successful implementation of any tournament of such scale, it is crucial to have a pool of volunteers and staff, who have received relevant and appropriate levels of training and upskilling. To that end, the Local Organizing Committee (LOC) played the most important role as the body in charge of running the show as far all tournament operations were concerned.

As with any major tournament, the key roles and responsibilities included venue operations at all 6 stadia, media operations, ticketing, commercial

partner services as well as team management of the 24 participating teams.

The capacity building and upskilling of personnel saw 317 LOC staff engaged full-time on the project, working as per the standards set by FIFA. To support the LOC staff, there were also 1528 volunteers, who were deployed at the tournament across various areas of delivery. After being carefully selected, all staff and volunteers underwent high level of training to bring them up to par with global standards of tournament operations.

Such training and capacity building has resulted in a qualified and well-trained pool of professionals, who have under their belt, the experience of having delivered a successful global football tournament. This enables India to explore the opportunity of bidding for future tournaments as well as utilizing the experience of this team to further pass on the knowledge to a greater number of professionals across the country. This is key, given the rapid growth of sports leagues and tournaments in India and the high demand for qualified, trained professionals.

## Transfer of Knowledge

One of the key challenges faced by countries, which are inexperienced in the hosting of major tournaments, is the presence of technical expertise across the industry as well as among key stakeholders involved in the delivery of such tournaments.

The World Cup helped provide the required knowledge and capacity to multiple departments of the concerned state governments as well as those of the central government, including The Ministry of Youth Affairs and Sports. The respective bodies gained valuable

experience and knowhow as well as the capacity to deliver large-scale international tournaments.

In addition to the LOC team, staff and volunteers who were trained for the tournament, certain key specific areas of the industry benefited from the transfer of knowledge and expertise. Some examples include 2,000 safety stewards, who were selected, trained and deployed. Tournament venue safety is a very important part of sporting events globally, but was significantly lacking in India.

Similarly, more than 80 groundskeepers across India were trained in proper pitch construction and maintenance. In a country like India, where out-dated methods of pitch management continue to be used for the most part, modern methods being introduced is a big help to ensure quality footballing facilities.



## Youth Engagement

India's successful stint with the FIFA U – 17 World Cup along with the success of the Mission XI Million programme shows India's serious intent of wanting to put itself on the global map as a footballing nation.

The Indian Government is committed towards effectively changing the sports scenario in India. Its full-fledged support for the FIFA U-17 World Cup and initiatives like Khelo India are testaments to the same.

The core objective of the Mission XI Million initiative was to engage 11 million school children with football

in some form. In a tremendous success for the initiative, it managed to reach 11,229,757 children from 21,821 schools across 470 cities across all Indian states.

We also saw thousands of young children attend the matches at the tournament, increasing the appetite for the game across the youth of the country.

“**Mission XI Million is a mass movement which will take the beautiful game of football to at least 11 Million boys and girls around the country. Children in every state, from Kashmir to Kanyakumari, from Kutch to Arunchal Pradesh will get a chance to learn, play and enjoy football. More than 15,000 schools around the country will be partners in this.**”

**Mr. Narendra Modi  
Prime Minister**

“**We have got the start. We should not stop here. I hope we get the U-20 World Cup, so that the start gets even bigger momentum. I believe if things go like this, it's not far when India will play in a World Cup on their own.**”

**Col. Rajyavardhan Singh Rathore  
Minister of State  
Youth Affairs and Sports**



## Integration into the Fabric of Indian Society

Perhaps the most important achievement of the FIFA U – 17 World Cup was one that came off the pitch and one which may not have concrete numbers to support it. For many years, India has been considered a sleeping giant of world football. The selection of India to host the tournament, along with the recent development of the new league structure and unprecedented investment into the game have provided a much needed boost to football in India.

Football has arguably taken its rightful place as the second sport of choice in India, only after cricket. There is an entire generation of young Indians, for whom football is the sport of choice as far as participation and consumption are concerned. Over the past decade, Indian fans flocked to the more popular European leagues to satisfy their appetite for the game and build affinity towards teams and players. However, the last few years have indicated that given the right backing, there is tremendous interest and desire for Indian

fans to consume football locally. The attendance and viewership numbers corroborate this fact.

The setting up of local heroes, visibility of Indian players at the highest level and the emergence of clear, tangible progression platforms have opened unprecedented doors for young players, making football an achievable, viable choice of career.

The increase in the number of young children playing the sport on the streets, at local grounds and in schools, proves that the perception of football is changing and evolving into one, which can be played anywhere, on any surface and by any number of players. The reach of the World Cup among female viewers as well as in the rural areas is also indicative of the penetration of the game into the masses of the country.





In the wake of the successful hosting of the FIFA U – 17 World Cup, there has been a tremendous positive impact on the Indian footballing landscape. There are new, relevant and tangible business opportunities, which have arisen. These are the key areas of the Indian football industry, which are open for intervention and are the new doors, which have opened as a result of the successful hosting of the tournament.

# C. BUSINESS OPPORTUNITIES

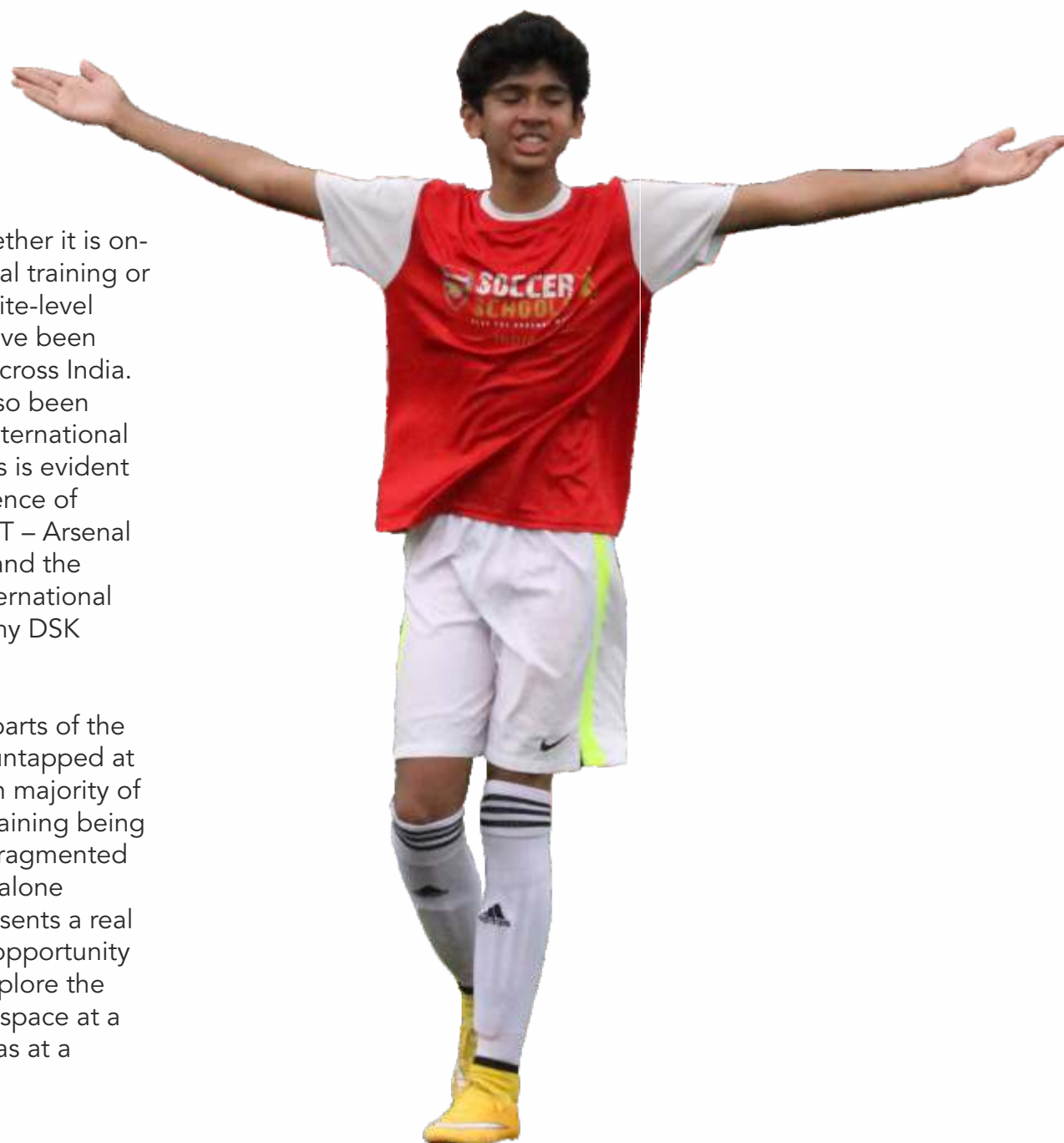
## Youth Development & Training

With football having captured the imagination of the Indian youth, and various initiatives underway to take the sport to children around the country, there now exists a vast pool of young children eager to learn and play the sport. With realistic, tangible and attainable progression platforms, football is being seen as a legitimate career path and the same is reflected in the attitudes of schools as well as those of parents. To enable the children to have the best possible opportunity to make it in the game, attitudes are changing towards training programmes and academies, with parents now willing to pay for top-level coaching for their children.

Most of the large-scale football training programmes in India have historically been government driven or under the aegis of the AIFF. However, over the past decade multiple private players have emerged in the training space, and 'pay-for-play' models are increasingly becoming an accepted part of the football landscape of

the country. Whether it is on-going recreational training or academies for elite-level players, there have been success stories across India. The same has also been recognized by international rights-holders, as is evident from the emergence of initiatives like IOT – Arsenal Soccer Schools and the Liverpool FC International Football Academy DSK Shivajians.

However, large parts of the country remain untapped at the moment with majority of the grassroots training being conducted in a fragmented fashion by standalone entities. This presents a real and immediate opportunity for entities to explore the football training space at a regional as well as at a national level.



## Infrastructure Development

A direct result of the growing popularity of the sport, is the increase in demand for quality facilities and footballing infrastructure. Whether at the recreational level, grassroots training or at elite setups, there is a real demand for football pitches and related infrastructure across the country.

The upgrading of the training facilities carried out as part of the preparation for the tournament has helped in providing access to 26 quality setups across India. However, there is still a vast gap in the demand and supply of high-class, well maintained football pitches across all states. Most of the footballing infrastructure in India currently exists in schools, and is therefore not available to the public.

Historically, commercial opportunities in infrastructure have been limited to big stadia or other large-scale projects. However, over the past few years, the demand for easily accessible, low cost options to play football has created

an opportunity to set up standalone football pitches across the country.

There are several companies, who have tapped into this growing demand for football infrastructure by setting up stand alone pitches, both grass and artificial turf. While artificial pitches have a higher upfront cost of installation, there is significantly lesser maintenance cost, and it has been seen that given the right business model, the upfront costs can be recovered in a short space of time by renting out of the pitches to play.

While the access to football pitches is slowly increasing, especially in the larger cities, there are a huge number of pitches, which are needed across the country and recent business ventures have shown that the same can present a commercially viable opportunity for private entities.

## Fan Engagement

With the wetting of the appetite of the Indian football fan, and newer fans being created everyday, there is a tremendous opportunity to tap into the growing pool and engage with them on an on-going basis. Football has become the favoured sport for a significant percentage of the youth in the country, and with the emergence of digital media, the access and reach for the sport has spread across India.

With majority of the youth being active online, digital media presents a platform, where Indian football fans are active and engaged on an on-going basis. The numbers indicate that the sheer volume of football fans in India presents a great opportunity for rights-holders and other entities to leverage the football wave.

With local leagues out-rating their foreign counterparts as far as viewership is concerned, the clubs are already undertaking multiple initiatives to engage with their fans and grow their fan base. The challenges of

sustainability and consolidation of the fan bases are unique to India, and loyalty towards new clubs and franchises will only increase over time.

One of the biggest challenges, which have emerged over the years as far as football fans in India are concerned, is the commercialising of fan bases. The Indian market is unique as far as spending patterns are concerned, and this is even more relevant in the field of sport. Entities have adopted models and commercial approaches, which rely on the power of numbers, so as to leverage India's masses and customize their plans accordingly.

The World Cup has taken a giant step towards strengthening the existing football fan base in India as well as creating newer fans overnight, as is evident from the varied demographics that were engaged with the tournament. This presents an unprecedented opportunity for entities to engage with

existing and newer fans of the game in India and leverage the numbers to build sustainable and commercially viable businesses.

## Broadcasting and Sponsorship

The attendance and viewership numbers of football in India, particularly those of the FIFA U – 17 World Cup point towards a major breakthrough as far as Indian sports audiences are concerned. The TV numbers in particular are comparable to those of cricket, which is a first for Indian sport.

While it was always believed that football in India had a very niche audience and properties such as the European leagues would struggle to reach out to the masses, the reality has proved to be very different. Domestic football, in particular the Indian Super League, as well as the FIFA U – 17 World Cup have thrown up unprecedented numbers in TV ratings, and opened up brand new audiences for the sport.

The varied demographics, who are now engaging with and consuming football, is a key indicator in proving that football has successfully managed to penetrate the masses across the country and includes a high number

of viewers across age groups, women as well those in rural areas. The numbers present a golden opportunity for broadcasters to strategically invest in the right footballing properties, as the viewership is only expected to grow on a year-on-year basis.

The TV numbers also provide real opportunities for brands that want to invest in the sport, as for the first time there is a real return on investment in football and the sponsorship landscape is already changing rapidly. The variety in the audiences also makes it a sensible and commercially viable option for consumer brands to reach out to the masses via an alternate platform.

# D. THE ROAD AHEAD





# THE ROAD AHEAD

One of the key takeaways of the successful FIFA U – 17 World Cup project has been that given the right approach, organization and leadership, the impact and benefit of hosting a large-scale tournament can go well beyond the event itself.

In the lead up to the tournament, several key initiatives were adopted, crucial projects undertaken and strategic policies implemented to ensure that the game as a whole was the real winner as far as football in India is concerned. India has put itself on the footballing map of the world, and proved to the global footballing community that it has great potential and appetite for the game.

We can now also claim to possess the capacity, ability and expertise to host big ticket sports events in a short space of time. There is already talk of India bidding for the FIFA U- 20 World Cup as well as other international sporting mega-events.

We have seen that given the vision and the right channelling of our resources, crucial factors like our sporting infrastructure can be brought to up to par with

international standards, without major overhaul. Such infrastructure and facilities pave the way for the youth across the country to embrace the sport and provides them a platform to recognize their true potential.

The FIFA U – 17 World Cup was not just a tournament for India. It was a very important landmark in our journey towards becoming a footballing superpower. It was also a testament to the popularity and love that the game enjoys in the country. The 'football fever' that gripped the nation during October 2017 needs to have on-going follow through and be used as the stepping-stone to grow and consolidate the sport in India.

Given the above, it can be seen that the investment and efforts put into hosting large-scale tournaments in India have to be seen not only as those made for a particular event, but also as investments made in the sport in the long term. The return on these investments begin on the day India is chosen as the host, and continue through the lead up to the tournament, all the way to several years after the last ball in the final is kicked.

It is this approach, which needs to be carried forward, as we seek to bring bigger and better events to India, and appreciate that many of the successes and achievements of these events will only be seen decades later.

We as a country need to appreciate that we are not bidding for and investing only in tournaments, but also investing in the future of the sport for an entire generation in India.



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focus on new business opportunities



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