

PROFESSIONAL FOOTBALL CLUBS IN INDIA : A COMPARATIVE STUDY

DISSERTATION

Submitted in partial fulfillment of the requirement of

**BACHELOR OF ECONOMICS
(Hons)**

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15BLS042**

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382007. GUJARAT, INDIA
MAY – 2019**

APPROVAL SHEET

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I **DHARAV SHAH** hereby declare that this written submission represents my ideas in my own words and where others' idea or words have been included, I have adequately cited and referenced the original sources. I also declare that I have adhered to all principles of academic honesty and integrity and have not misrepresented or fabricated or falsified any idea / data / fact / source in my submission. I understand that any violation of the above will be cause for disciplinary action by the PANDIT DEENDAYAL PETROLEUM UNIVERSITY and can also evoke penal action from the sources which have thus not been properly cited or from whom proper permission has not been taken when needed.

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ACKNOWLEDGEMENT

I Would like to extend my sincere and heartfelt obligations towards all the personages who have helped me in this endeavor. Without your active guidance, help, cooperation and encouragement, I would not have made headway in this project.

I am ineffably indebted to Dr. Prashanta Chandra Panda for conscientious guidance and encouragement to accomplish this pursuit.

My heartfelt commendation to Dr. Nigam Dave, for his constant efforts and encouragement with support not only during this dissertation but throughout the course of our college education.

I extend my gratitude to School of Liberal Studies and Pandit Deendayal Petroleum University for giving me the opportunity and infrastructure to complete this project.

I also acknowledge with a deep sense of reverence, my gratitude towards my parents and members of my family for economical support and friends for constant moral support.

Last but not the least, gratitude goes to all the subjects who took our time and contributed towards primary data collection and helped complete the study.

Apologies for missing out anyone. Omission in this brief acknowledgement does not mean lack of gratitude.

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Abstract

Professional football is a major sport and was played in over 200 countries by the end of the 20th Century. Over 250 million players were playing the sport with the industry worth US\$600 billion worldwide. The trend of professionalizing the football leagues in a country was adapted by many Asian countries in the beginning of the 21st Century. The major benefits of professionalizing a league is to bring in commercialization and privatization of the clubs. Similarly India adapted to this new system and launched its first professional league in 2007. In 2013 another unrecognized professional league known as the Indian Super league was launched with India being one of the few countries with two fully recognized top tier leagues in 2016. India has 836 million television viewers out of which 498 million have sampled some content of football in the country. Huge viewership of various football tournaments over the world makes India a major market for leagues all around the world.

This paper aims to understand the league structure of professional football in India along with potential earning sources of the clubs and the support system if any provided by the government of India. Finally, it aims to establish the potential of professional football in India and the challenges it faces. Also a comparison with Japan professional league, J-League is attempted.

CHAPTER 1

INTRODUCTION

Association football or commonly known as football/soccer has 4 Billion fans across the globe making it the most popular sport. It is popular amongst the South American nations and across European countries but the beautiful games popularity is on the rise in countries like USA, Iceland, Australia, Japan and Costa Rica. African nations are also now a huge force of the sport. There are even countries where football is part of the culture and everyday lifestyle. They are Brazil, Germany, Argentina, Spain and Italy.

Football was first introduced in India in the mid nineteenth century by the British soldiers when they came with the concept of colonization. It was during this time when the oldest football club Mohan Bagan was founded in the year 1889 in Bengal. One of the oldest competition in the world the Durand cup also originated in 1888. Indian Football Association(IFA) was formed during this time but had no Indian member on the board. However in 1937 it changed to All India Football Federation which comprised majorly of Indian members.

Golden Phase of Indian Football

The 1950-1960 period is known as India's golden era in football under the guidance of the coach Syed Abdul Rahim. We were considered both the Olympics and Asian games top contenders. Major results were 1951- Gold medal in Asian Games, 1953-55 winners of Colombo Cup, 1956- finished 4th in the Olympics, 1958- 4th in Asian Games and runners up in AFC Asian Cup in 1964. However, after 60s Indian football did not have any major success in any of the major tournaments over the years.

Introduction of professional league

In the beginning of the 21st Century India also decided to venture in Professional league system like many major Asian countries like Japan and South Korea had done. National football league was the top tier of Indian football from 1996-2006 consisting of 3 tiers. It was transformed into I-League in 2007. Its failure to reach the potential of venturing into sponsorship and viewership led to formation of the Indian Super League(ISL) in 2013 to bring in better deals for improving and increasing both people watching and playing football in the country. Through increasing revenue and slow success obtained by the professional leagues India is aiming to emulate success of Japan and South Korea in football.

1.1 WHY THIS TOPIC?

With the formation of the Indian Super League in 2013, India unlocked its potential of professional football in the country along with providing football content for the large set of sports viewers already residing in the nation. Government support has helped in reaching football craze to new heights. The year 2018 saw 48000 hours of football content being telecast which drew 498 million viewers from all over the country. Football viewership share was boosted by the FIFA U-17 World Cup hosted by the country and FIFA World Cup 2018 held in Russia. As per Star Sports India Football Forum(IFF) U-17 world cup was witnessed by 1,347,143 at 6 host venues across the country with an average attendance of 25,906. The cumulative viewership of the FIFA world cup in Russia was 254 million which included live matches, highlights, repeats and wrap around shows on the SPN channels and DD Sports.

The English Premier League(EPL) is the most watched football league in the world currently. India contributes 3% of total TV viewership of sports of the 9% in the world. ISL contributes 60% of total viewership of football in India. ISL is ranked 3rd in the average attendances of professional football leagues around the world at 26000. Which is better than the professional

leagues of Spain, Italy and France. Revenue in € Million of ISL is 65 for 8 teams and that of J-League is 860 for 18 teams. Hero renewed its sponsorship of ISL from \$8 million to \$25 million within 3 years time though a significant improvement is needed to catch with IPL which has sponsorship deal of \$340 million with Vivo. Overall sports sponsorship in India is only \$1.1 billion compared to \$16.2 billion in the US. This shows a lot of potential is not yet captured and in the coming years it will only be increasing with people understanding more of the sports industry.

1.2 OBJECTIVE OF THE STUDY

The objective of this paper is to study the support system to professional football by government of India and the state governments. This research aims to understand the league structure of professional football in India and attempt to find the potential earning sources of professional football clubs in India.

1.3 SCOPE OF THE STUDY

This paper will help in exploring and attempting to know whether governments support to football is helping in gaining faster progress. This dissertation will help in understanding about the various earning sources of the professional football clubs and how it impacts the running of clubs on day to day basis. This dissertation will also aim to understand whether professional football in India is improving to the standards of the professional league of Japan that is the J-league.

1.4 SUMMING UP

In this section, why this topic was chosen and the the objectives of the study were explained. Further the scope and the relevance of the study was also explained. The next chapter will look at the literature review which will show how this research is different to ones done in this area.

CHAPTER 2
LITERATURE REVIEW

- Amit Mantri (2013) : Indian Football - The Rising Billion - This research paper contains information on Indian football by the apex bodies. It tells about the various corporate investments procured by the clubs over the years. The paper further talks about the opportunities in Indian football and the infrastructure developments over the years. A data of number of football stadiums along with the capacity is also given. Major findings are FIFA will invest \$500,000 for setting up of 4 regional academies (U-15) in Mumbai, Delhi, Kolkata and Bangalore. Tata Football Academy is the biggest source of player recruitments in Indian clubs. It had stated that by 2017 Indian football ecosystem required 643,000 support staff by 2017.

- Fox Sports(2019) : Stats reveal India's I-league could be most competitive domestic league in Asia

This article provides statistics on how I-league over the years provides fans and viewers with interesting finishes to the seasons since 2014-15. Since the introduction of ISL, I-league has been cold shouldered but stats show that in the last four seasons the league champions were decided on the final match day. Data shows every match day has edge of the seat action which ISL has failed to provide with less attraction since the 1st season. The article argues it is due to the stats the league should be allowed to grow rather than making ISL get the major provisions as it has major corporate attention.

- Zaphr Media Labs : TV Analytics of football in India : Did FIFA make a lasting impact on ISL?

This article provides data on how FIFA'S marketing helped Indian fans getting crazy for football. The FIFA U-17 world cup opened with 407 million TV viewers but dipped to 1.3 million when India got eliminated. The final match attracted 3.8 million viewers across the country. Similarly ISL opened with 9.4 million viewers but as season

continued had range viewership. FIFA made viewers stay back for ISL which started very next month. Data collected showed that 28.83% FIFA U-17 viewers tuned into ISL in 2017. This article further provides data on TV penetration showing FIFA was most watched in the north-eastern cities and not a single southern city came under the 1 million cap whereas ISL had major TV penetration in the southern states of Kerala and Tamil Nadu. 75% of ISL viewers were college educated.

- Shyam Vasudevan(2019) : Why I-League is made to play second fiddle in game of television eyeballs.

This article shows that stars the TV broadcaster is not obligated to show all I-League matches and since the team have argued as is their major earning source the matches were shown on JIO TV and HOTSTAR the OTT platforms. ISL had 127.7 million tune ins across 59 games whereas I-League only 17.4 million tune ins across 46 games in the 2018 season. Timing of I-League matches attract less viewers on TV but across season I-league had a better average stadium attendances report than the ISL due to more competitiveness and the regional support of the teams. Restructuring of league system in the country is a major debate with I-League clubs wanting a merger of both ISL and I-League to prevent the major clubs from closing down.

- Ad Age India Bureau(2018) : How hero ISL continues to build momentum for football in India.

This article tells how once India was a strong force of football during 1950s. Then for many years it lost its popularity until professional players from India like Baichung Bhutia and Sunil Chhetri started playing for overseas leagues like MLS and EPL. Sunil Chhetri had played for Kansas City in MLS and Sporting CP B team in Portugal whereas Baichung has played for Bury in England and also in the Malaysian Super League. Regional TV channels has also helped in promoting this sport by covering matches from different states. Sponsorship increased from INR 110 million in 2016 to INR 169million

in 2017. Major broadcaster Star renewed their deal and is expecting to earn INR 400 crores from broadcasting right and ad revenue .

- Abhishek Kundu (2018) : ISL player's salary list 2018-19

This article talks about the increase in wages of players over the years since ISL was inaugurated in 2013. This article further shares the data of the list of foreign players and their salary and the top 5 expensive Indian players of the 10 ISL teams. The highest salary of foreign player is \$480,000 and that of a Indian Player is \$2,84,310. The wage gap in INR being 1.37 crores.

- Breaking the mould: J-League soccer, community and education in Japan by Richard Light and Wataru Yasaki :

This research shows how J-League has achieved success in Japan. The promotion and organization of J-League as a community sports for all. It shows how the league has been able to tap in regional and local identity and making it a part of culture. The league has brought a significant change in practice of children's sport at school. The research provides how the Japanese Football Association(JFA) targeted established corporate teams and through joint ventures with the existing owners, local council and prefectural government helped in promote sport in the local region. Facilities and minimum stadium capacities were then set up. Junior youth teams have also been set up around the J-League teams. To show the success of J-League an example of city Kashima is taken under consideration. It tells how the local communities have helped in growing of home teams. Kashima Antlers is the most successful club in J-League history winning the title 8 times and also reaching the Club World Cup final against Real Madrid in 2016.

- Economics of football business around the world by AIFF(All India Football Federation) and FICCI(Federation of Indian Chambers of Commerce and Industry) :

This research contains how major football clubs around the world earn money on daily basis and their yearly revenues. It says usually there is a strong link between a football team and its host cities. Football economics is an interesting topic to study as they don't

often fit into neat economic models. Revenue streams include ticket sales, merchandise, sponsorships, advertising and additional uses of the stadium and sale of TV broadcasting rights. The research paper talks about the top earning teams of various top professional leagues around the world. It also talks about the rise in wage bills of teams. Further it makes us understand how China has become a big heavyweight of football in Asia by pumping huge amounts of money. In the end it talks about success story of Bengaluru FC in a short span of time owing to their professionalism build up of having a residential academy and also attracting big players and appointing physical coaches and dieticians too.

- Jsal Shah, Velocity MR CEO : Rise in popularity of football in India

This study was conducted to make a report of popularity of various world cup teams in India and how people follow it in various countries. The survey was conducted across the major metropolitan cities of India with the sample size of 2000. Amongst those who are aware of the Indian football national team, 84% responded that they would support the team and watch the national teams upcoming fixtures. The study shows that World cup 2018 Russia was able to reach larger mass of people due to increased advertisement spending by FIFA. FIFA generated \$404 million from marketing rights associated in 2014 World Cup, which comprised 29% of its annual revenue. During 2018 World Cup, Asia Pacific region contributed 41% of the global increase (\$613.5 bn). Comparatively, North America accounts for 32%, Western Europe accounts for 13% with Latin America at 8% and Eastern Europe at 5%.

- Subrata Dutta, Novy Kapadia & Syed Nayeemuddin: Can Indian football make it to the top league.

This article talks about how less populated countries like Iceland and Croatia play in a World Cup and not India. It also talks about India's increased chances due to recent government intervention and number of teams rising for the 2026 FIFA World Cup. It talks about how India is now having a good scouting network and the emphasis on

developing on the grassroots level. Further it talks about the government's increased support for football with India hosting the U-17 world cup and state governments coming forward for the development of the sport along with coaching education vastly building up.

- Meenakshi Verma Ambwani (2016) : India is a sleeping giant for football.

This article speaks about FIFA marketing division Director's statement on Indian football. The director spoke about how the country is an emerging market commercially. Indian companies are slowly understanding that football is growing at a rapid state in the country and the overall mission is to convince the fans and increase the reach of sport in the country by developing it. Talks about how the U-17 world cup will help bring awareness in the country.

2.1 SIGNIFICANCE

This literature review observed a similar theme that was common across all research's, articles and statistics. It showed that professional football clubs in India has popularity but still needs expansion by sponsorships and attracting viewers. It is evidently clear that Indian football lags behind the J-League of Japan. The review provides evidence that J-league slowed down after its formation in the 2000 but regained popularity after some low years. ISL also is facing similar low period 5 years after its formation.

2.2 SUMMING UP

The next chapter will focus on the research methodology.

CHAPTER 3

RESEARCH METHODOLOGY

3.1 SECONDARY STUDY

For the purpose of this study secondary information was used. Information and data was collected from journals, news articles, financial statements and professional associations. This research will look into how professional football in India has developed over the years by comparing as well as following the growth road map of J-League, Japan.

3.2 SUMMING UP

The next chapter will focus on the detailed structure of the I-League, ISL and J-League

CHAPTER 4

STRUCTURE OF LEAGUES

4.1 I-LEAGUE

1. INTRODUCTION

The league currently is the top tier professional football league in India running parallel to the franchise based ISL. It currently comprises of 11 teams who play 20 times each in October - March season. It was founded as a successor to the National football league and commenced on November 2007. The league is the country's first ever professional league to help in increase the talent for the national team. The league operates on a system of promotion and relegation to the 2nd division I-League. I-League champions are granted the opportunity to participate in the AFC Champions League, Asia's top international club competition. , a total of seven clubs have been crowned champions. Dempo have won the most titles in league history, being crowned champions three times. Churchill Brothers and former I-League side Bengaluru have won the league twice. Salgaocar, Mohun Bagan, Aizawl, Minerva Punjab, and current league champions, Chennai City have won it once. ONGC were the first title sponsors when the league commenced in 2007. The league also announced a change in their foreign-player restrictions with the new rule being that all the clubs could sign four foreigners – three non-Asian and one which must be Asian. The original ten clubs in the I-League's first season were Air India, Churchill Brothers, Dempo, East Bengal, JCT, Mahindra United, Mohun Bagan, Salgaocar, Sporting Goa, and Viva Kerala.

2. 2007 - 2010

To retain its purpose the league needed to come to various cities and it had to promote teams from the 2nd division in the 2009 to increase the teams. On 9 December 2010 the All India Football Federation signed a 15-year, 700-crore deal with Reliance Industries and International Management Group of the United States. The deal gave IMG-Reliance exclusive commercial rights to sponsorship, advertising, broadcasting, merchandising, video, franchising, and rights to create a new football league. This deal came about after the AIFF ended their 10-year deal with Zee Sports. The clubs however were not happy with what IMG-Reliance was doing as they felt there was not enough promotion of the respected teams taking place.

3. 2010 TILL NOW

The clubs had demanded the I-League be made a separate entity from both the AIFF and IMG-Reliance. In 2012, the I-League clubs formed their own organization known as the Indian Professional Football Clubs Association (IPFCA) to safeguard their interest and promote football in India. The league was then given a major boost from its main derby, the Kolkata derby, between East Bengal and Mohun Bagan. On 20 November 2011, 90,000 people watched at the Salt Lake Stadium as Mohun Bagan defeated East Bengal 1–0. The league also saw more expansion to others areas with the promotion of United Sikkim from the 2nd Division. Meanwhile, while the league continued to grow, so did the players' demand. During this period plenty of Indian players were wanted on trial by foreign clubs, mainly in Europe. After his return from MLS, Sunil Chhetri and international teammate Jeje Lalpekhlua were called for trials at Scottish Premier League side Rangers in 2011. Subrata Pal had trials at RB Leipzig before finally signing for Vestsjælland in 2014. And Gurpreet Singh Sandhu underwent trials at then Premier League side Wigan Athletic and finally signing for Stabæk Fotball, Norway in 2014.

At the same time, as Indian players demand abroad increased, the demand for higher quality foreigners in the I-League also increased. Former A-League player of the year and Costa Rican international Carlos Hernández signed with Prayag United before the 2012–13 season from the Melbourne Victory. Lebanese international Bilal Najjarine also signed with Churchill Brothers in 2012. The league was sponsored by Hero from 2014-18 hence Hero I-League and now the new sponsors are Nestle therefore the league will be known as Nestle I-League.

STADIUM CAPACITIES OF I-LEAGUE

TEAM	LOCATION	CAPACITY
CHURCHILL BROTHERS	SALCETE, GOA	6000
MINERVA PUNJAB	PANCHKULA, HARYANA	12,000
REAL KASHMIR	SRINAGAR, JAMMU & KASHMIR	15,000
INDIAN ARROWS	BHUBHANESHWAR, ODISHA	15,000
AIZAWL	AIZAWL, MIZORAM	20,000
CHENNAI CITY	COIMBATORE, TAMIL NADU	30,000
SHILLONG LAJONG	SHILLONG, MEGHALAYA	30,000
NEROCA	IMPHAL, MANIPUR	35,285
GOKULAM KERALA	KOZHIKODE, KERALA	75,000
EAST BENGAL	KOLKATA, WEST BENGAL	85,000
MOHUN BAGAN	KOLKATA, WEST BENGAL	85,000

4.2 J1-LEAGUE

1. INTRODUCTION

The J1 league is the top division of the Japan professional football league. It is known as the Meiji Yasuda J1 League due to sponsorship reasons and is one of the most successful football league in Asia. The league also has 2nd and 3rd tier known as the J2 league and the J3 league respectively. Before the inception of the J.League, the highest level of club football was the Japan Soccer League (JSL), which consisted of amateur clubs. Despite being well-attended during the boom of the late 1960s and early 1970s (when Japan's national team won the bronze Olympic medal at the 1968 games in Mexico), the JSL went into decline in the 1980s, in general line with the deteriorating situation worldwide. To raise the level of play domestically, to attempt to garner more fans, and to strengthen the national team, the Japan Football Association (JFA) decided to form a professional league.

2. BEGINNING YEARS

The professional association football league, J.League was formed in 1992, with eight clubs drawn from the JSL First Division, one from the Second Division, and the newly formed Shimizu S-Pulse. At the same time, JSL changed its name and became the former Japan Football League, a semi-professional league. Although the J.League did not officially launch until 1993, the Yamazaki Nabisco Cup competition was held between the ten clubs in 1992 to prepare for the inaugural season. J.League officially kicked off its first season with ten clubs in early 1993. Despite the success in the first three years, in early 1996 the league attendance declined rapidly.

In 1997 the average attendance was 10,131, compared to more than 19,000 in 1994. Change of infrastructure and game formats were needed. Japan Football Association(JFA) announced the J.League Hundred Year Vision, in which they aim to make 100 professional association football clubs in the nation of Japan by 2092, the hundredth season. The league also encouraged the clubs to promote football or non-football related sports and health activities, to acquire local sponsorships, and to build good relationship with their hometowns at the grass-root level. The league believed that this will allow the clubs to bond with their respective cities and towns and get support from local government, companies, and citizens. In other words, clubs will be able to rely on the locals, rather than major national sponsors.

3. 1999 - 2005

The infrastructure of the league was heavily changed in 1999. The league acquired nine clubs from the semi-professional JFL and one club from J.League to create a two division system. The top flight became the J.League Division 1 (J1) with 16 clubs while J.League Division 2 (J2) was launched with ten clubs in 1999. The former second-tier Japan Football League now became the third-tier Japan Football League. Also, until 2004 (with the exception of 1996 season), the J1 season was divided into two. At the end of each full season, the champion from each half played a two-legged series to determine the overall season winner and runners-up. Júbilo Iwata in 2002, and Yokohama F.Marinos in 2003, won both "halves" of the respective seasons, thus eliminating the need for the playoff series. This was the part of the reason the league abolished the split-season system starting from 2005.

4. 2005 TILL NOW

Since the 2005 season, J.League Division 1 consisted of 18 clubs (from 16 in 2004) and the season format became more similar to European club football. The number of relegated clubs also increased from 2 to 2.5, with the 3rd-to-last club going into the promotion/relegation

playoffs with the third-placed J2 club. Since then, other than minor adjustments, the top flight has stayed consistent. Japanese teams did not treat the AFC Champions League that seriously in the early years, in part due to the distances travelled and teams played. However, in recent years, with the inclusion of the A-League in Eastern Asia, introduction to the Club World Cup, and increased marketability in the Asian continent, both the league and the clubs paid more attention to Asian competition. For example, Kawasaki Frontale built up a notable fan base in Hong Kong, owing to their participation in the Asian Champions League during the 2007 season. Continuous effort led to the success of Urawa Red Diamonds in 2007 and Gamba Osaka in 2008. Thanks to excellent league management and competitiveness in Asian competition, the AFC awarded J.League the highest league ranking and a total of four slots starting from the 2009 season. The league took this as an opportunity to sell TV broadcasting rights to foreign countries, especially in Asia.

Also starting from the 2008 season, the Emperor's Cup Winner was allowed to participate in the upcoming Champions League season, rather than waiting a whole year (i.e. 2005 Emperor's Cup winner, Tokyo Verdy, participated in the 2007 ACL season, instead of the 2006 season). In order to fix this one-year lag issue, the 2007 Emperor's Cup winner, Kashima Antlers' turn was waived. Nonetheless, Kashima Antlers ended up participating in the 2009 ACL season by winning the J.League title in the 2008 season. In 2015 the J.League Division 1 was renamed J1 League. Also, the tournament format was changed to a three-stage system. The season was split into first and second stages, followed by a third and final championship stage. The third stage was composed of three to five teams. The top point accumulator in each stage and the top three point accumulators for the overall season qualified. If both of the stage winners finished in the top three teams for the season, then only three teams qualified for the championship stage. These teams then took part in a championship playoff stage to decide the winner of the league trophy. Despite the new multi-stage format being initially reported as locked in for five seasons, due to a negative reaction from hardcore fans, and a failure to appeal to casual fans, towards the end of the 2016 it was abandoned in favor of a return to a single-stage system. From 2017, the team which accumulates the most points will be named champion, with no championship stage taking place at the season's end, and from 2018, the bottom two clubs are relegated and the 16th-placed club enters a playoff with the J2 club that wins a promotion playoff series. If the J2 playoff

winner prevails, the club is promoted, with the J1 club being relegated, otherwise the J1 club can retain its position in J1 League with the promotion failure of the J2 club. In November 2017, Urawa Red Diamonds played the AFC Champions League final against Al Hilal. After a draw in the first leg, Urawa Red Diamonds won the second leg 1-0 and were crowned Asian Champions. In the past 10–15 years, Japanese clubs have risen not only continentally, but also internationally. Clubs Gamba Osaka and Urawa Red Diamonds have been crowned Asian champions and participated in the Club World Cup, always targeting at least the semi-finals. Kashima Antlers were finalists of the 2016 edition and eventually lost to Real Madrid. The total number of foreign players is restricted to five per club. Clubs can register up to four foreign players for a single match-day squad, of which a maximum of three are allowed from nations outside the Asian Football Confederation (AFC). Players from J.League partner nations (Thailand, Vietnam, Myanmar, Cambodia, Singapore, Indonesia, Malaysia, Iran and Qatar) are exempt from these restrictions.

STADIUM CAPACITIES OF J1-LEAGUE

TEAM	CAPACITY
URAWA RED DIAMONDS	63,700
KASHIMA ANTLERS	40,728
SHIMIZU S-PULSE	20,339
GAMBA OSAKA	40,000
YOKOHAMA F.MARINOS	72,370
KAWASAKI FRONTALE	26,000
SHONAN BELMARE	15,200
VISSEL KOBE	30,132
JUBILO IWATA	15,165
MATSUMOTO YAMAGA	20,000
NAGOYA GRAMPUS	45,000
CEREZO OSAKA	47,816
VEGALTA SENDAI	19,694
CONSADOLE SAPPORO	41,484
SAGAN TOSU	24,490
FC TOKYO	50,100
OITA TRINITA	40,000
SANFRECCE HIROSHIMA	36,906

4.3 ISL

1. INTRODUCTION

The Indian Super League is a co-existing top professional football league with I-League in India. It is known as Hero Indian Super League due to sponsorship reasons. 10 teams play out the league during September - March. Founded on 21 October 2013 in partnership with IMG, Reliance Industries, and Star Sports, the Indian Super League was launched with the goal of growing the sport of football in India and increase its exposure in the country. The competition's first season took place in 2014 with eight teams. During the first three seasons of the Indian Super League, the competition operated without official recognition from the Asian Football Confederation, the governing body for the sport in Asia. The competition also operated along the same lines of the Indian Premier League, the country's premier Twenty20 cricket competition, with the league campaign lasting for 2–3 months and matches held daily. However, before the 2017–18 season, the competition earned recognition from the AFC, expanded to ten teams, and extended its schedule to five months.

Unlike most football leagues around the world, the Indian Super League does not use promotion and relegation, instead choosing to grow the league through expansion, similar to Major League Soccer in United States. During the league's first four seasons, two teams have been crowned champions, both winning twice each. ATK won the first title in 2014 before winning their second title in 2016. Chennaiyin are the other club to be crowned as champions, having done so in both 2015 and 2018. It was also revealed around this time that not only would bidders need to comply with a financial requirement but they would also need to promote 'grassroots' development plans for football within their area. Finally, in early April 2014, the winning bidders were announced. The selected cities/states were Bangalore, Delhi, Goa, Guwahati, Kochi, Kolkata, Mumbai, and Pune. Former India cricket player Sachin Tendulkar, along with PVP Ventures, won the bidding for the Kochi franchise. Another former Indian cricket player, Sourav Ganguly, along

with a group of Indian businessmen and La Liga side Atlético Madrid, won the bid for the Kolkata franchise. Meanwhile, Bollywood stars John Abraham, Ranbir Kapoor, and Salman Khan won the bid for the Guwahati, Mumbai, and Pune franchises respectively. Bangalore and Delhi were won by companies while Goa was won by a partnership between Videocon, Dattaraj Salgaocar, and I-League side, Dempo. The first team to be launched officially was the Kolkata franchise as Atlético de Kolkata on 7 May 2014. On 7 July 2014, the team announced the first head coach in league history, Antonio López Habas. The next day, Kolkata also announced the first official marquee signing in the Indian Super League, UEFA Champions League winner Luis García. Eventually, all eight teams were revealed as Atlético de Kolkata, Bangalore Titans, Delhi Dynamos, Goa, Kerala Blasters, Mumbai City, NorthEast United and Pune City.

However, on 21 August 2014, it was announced that due to Bangalore's owners dropping out, Chennai would be given a franchise instead. The team was eventually named Chennaiyin FC. At the same time, the original marquee players were Luis García, Elano, Alessandro Del Piero, Robert Pirès, David James, Freddie Ljungberg, Joan Capdevila, and David Trezeguet. During the first three seasons of the Indian Super League, attendances across the competition had exceeded expectations of pundits and of the domestic I-League mainly due to the timings at which the matches took place especially on working days and needs no mention sheer promotion. Television ratings were also strong for the competition, which is expected after better commentary, better telecasting, pre match post match shows as well as hourly reminders in various channels as well as social media interaction.

However, despite the general success off the pitch, the competition drew criticism in other areas. Due to the need to accommodate the ISL into the Indian football calendar, the I-League season was shortened and went from having an October to May schedule to January to May schedule. Indian players would play for both an ISL team and an I-League club while the I-League continued to suffer from lack of visibility compared to the ISL. India head coach Stephen Constantine had called for both the ISL and I-League to either run together at the same time or merge.

2. 2016 - 2019

On 18 May 2016, IMG–Reliance, along with the AIFF and I-League representatives met during a meeting in Mumbai. During the meeting it was proposed that, starting from the 2017–18 season, the Indian Super League become the top tier football league in India while the I-League be reformed as League One and be relegated to the second division without any reason, further confirming the oppression of the business powerhouses in the country. The competition would also expand by two teams and continue to operate without promotion and relegation, as stated earlier due to the 15 crore attraction of the FSDL each year, but run for 5–7 months instead of 2–3. The idea was not entertained by the I-League representatives. In June 2017, IMG–Reliance, the AIFF, I-League representatives, and the AFC met in Kuala Lumpur in order to find a new way forward for Indian football. The AFC were against allowing the ISL as the main league in India while I-League clubs wanted a complete merger of the ISL and I-League.

A couple weeks later, the AIFF proposed that both the Indian Super League and I-League run simultaneously on a short-term basis with the I-League winner qualifying for the AFC Champions League and the AFC Cup qualification spot going to the ISL champion. The proposal from the AIFF was officially approved by the AFC on 25 July 2017, with the ISL replacing the domestic cup competition, the Federation Cup which was a true Knockout cup competition. It was also stated that the competition would now run for five months starting with the 2017–18 season and the competition would expand to 10 teams as more teams means more money, glamour and promotion. A month later, on 12 June, it was announced that I-League side, Bengaluru, and Tata Steel (for Jamshedpur) had won the bidding for the new teams. On 22 September 2017, the competition announced officially that it would be expanding its season by two months, thus making the league last for five months instead of three. The competition would also go from having matches played daily to being played between Wednesday and Sunday. The next year, prior to the 2018–19 season, it was reported that Reliance Industries had bought out IMG's shares in the league. IMG realizing that the robust business model will soon be exposed, pulled out, thus giving Reliance Industries 65%

ownership of the league while Star Sports retains 35%. During the 2018–19 season, the Indian Super League will run from September to March. All ten teams play each other twice, home and away, for eighteen matches each. At the end of the season, the top four sides qualify for the playoffs. The regular season would be fourteen matches long. The top four sides at the end qualify for the playoffs.

3. LEAGUE STRUCTURE

The first round of the playoffs sees the first placed team take on the fourth placed team while the second placed team faces the third. During the playoffs, the first round is played in a two-legged format with both teams playing each other at their home venues. At the end of the two matches, the team which leads on aggregate would move on to the final. The final is a single-leg match which takes place in a neutral venue. If scores were tied on aggregate in the first round or in the final, 30 minutes of extra time would be used to determine the winner and finally, if still tied, penalties. For the upcoming 2018–19 season, each team can have a maximum of 25 players on their roster and a minimum of 22. The players have to be represented by FSDL agents. Of the 22–25 players on the roster, only a maximum of seven players can be foreign while at least two must be Indian developmental players. Each team is also allowed to spend a maximum of 17.5 crore on their squad, as that will be the salary cap for this season. Finally, each team is also allowed to sign a marquee foreign player who wouldn't count towards the salary cap but it isn't a requirement.

STADIUMS CAPACITIES OF ISL

TEAM	LOCATION	CAPACITY
ATK	KOLKATA, WEST BENGAL	50,500
BENGALURU	BANGALORE, KARNATAKA	24,790
CHENNAIYIN	CHENNAI, TAMIL NADU	20,765
DELHI DYNAMOS	DELHI	14,342
GOA	MARGAO, GOA	18,600
JAMSHEDPUR	JAMSHEDPUR, JHARKHAND	24,424
KERALA BLASTERS	KOCHI, KERALA	38,086
MUMBAI CITY	MUMBAI, MAHARASHTRA	7,790
NORTH EAST UNITED	GUWHATI, ASSAM	23,627
PUNE CITY	PUNE, MAHARASHTRA	10,237

4.4 SUMMING UP

The next chapter contains the various research findings.

CHAPTER 5

RESEARCH FINDINGS

- In 2017 India spent INR 3200 crores on sports infrastructure and training through its annual union and state budgets. United Kingdom(UK) spent INR 9000 crores in the same fiscal. The result can be seen at the Rio Olympics where India won mere 2 medals and the UK 67.

ALLOCATION OF FUNDS TO SPORT FEDERATION, AUTHORITY AND EVENTS

MINISTRY OF YOUTH AFFAIRS AND SPORTS	IN 2017-18	IN 2018-19
OVERALL BUDGET	1938.16cr	2196.35cr
ASSISTANCE TO NATIONAL SPORTS FEDERATIONS	302.18cr	302.18cr
INCENTIVE TO SPORTS PERSONS	18.13cr	23cr
NATIONAL WELFARE FUND FOR SPORTS PERSONS	334.34cr	374cr
KHELO INDIA	350cr	520.09cr
ENHANCEMENT OF SPORTS FACILITY IN J&K	75cr	50cr
SPORTS AUTHORITY OF INDIA	495.73cr	429.56cr

- This report clearly shows on how the government wants to help increase sports infrastructure and facilities in India. Funding to the Khelo India program has increased and the money to the office body has decreased.

- Football has seen a massive expansion after introduction of ISL in the country. From getting deals worth 110cr in 2016 to 179cr in 2017. On ground sponsorship grew by 14.7% . Sponsorship deals grew by 41.84%. The uptake, from INR 98 crore (\$14 million) in 2016 to INR 139 crore (\$21 million), came on the back of the Indian Super League adding two more franchises to become a ten-team league. The other key factor in the upswing was the raft of international deals that a number of Indian brands entered into with Premier League clubs. Looking at just the ISL, Team Sponsorship has gone up by 22% due to two additional teams and more games (total 95).
- However very few corporate businesses have come forward in investing in the ISL and the I-League. Indian corporate know the perks of investing in football and major have deals with clubs abroad than in the developing sport of the country. Foreign direct investment was lost when IMG pulled out of the ISL deal with reliance citing slow growth of the game. The international deals that Indian brands struck with English clubs tote up to INR 75-80 crore (\$11.36 - 12.12million) all told, the notable ones being:

HCL continued its association with Manchester United

Wipro continued its association with Chelsea

Apollo continued its association with Manchester United and signed with Crystal Palace also

MRF signed up with West Bromwich Albion, Newcastle United, and West Ham United

Gulf Oil signed with Manchester United.
- Monthly social conversations for ISL teams is at the lowest only in February and March 2017. Monthly social conversations for ISL franchises picked up in July and grew exponentially in November and December. Atletico de Kolkata, Chennaiyin FC, Bengaluru FC and FC Goa are the most searched ISL franchises as per average monthly volumes. Delhi Dynamos FC's average monthly search volumes, lowest of the lot, it is 1/19th of that of Atletico de Kolkata. Except for April'17 which was an anomaly, monthly average search volumes for ISL franchises picked up in July, grew exponentially in November and peaked in December.

	Bengaluru FC	Kerala Blasters	Chennaiyin FC	ATK
Social Conversation	79,684	70,968	54,216	53,344
Search	959,925	350,200	1,101,025	1,161,600
Facebook	320,000	1,900,000	456,000	1,100,000
Twitter	277,000	1,790,000	787,000	496,000
Instagram	622,000	412,000	112,000	115,000
TVR	0.3	0.6	0.3	0.5
Reach	55,000,000	61,000,000	62,000,000	57,000,000

	FC Goa	Pune City	Mumbai City	Delhi Dynamos
Social Conversation	31,678	28,109	26,336	19,275
Search	779,050	508,475	415,275	61,575
Facebook	457,000	912,000	584,000	654,000
Twitter	307,000	134,000	150,000	113,000
Instagram	116,000	66,500	66,000	47,500
TVR	0.3	0.3	0.4	0.3
Reach	55,000,000	61,000,000	61,000,000	49,000,000

	Jamshedpur FC	NorthEast United FC
Social Conversation	16,732	16,711
Search	46,500	321,675
Facebook	65,207	319,000
Twitter	6,954	418,000
Instagram	20,600	73,900
TVR	0.4	0.4
Reach	60,000,000	51,000,000

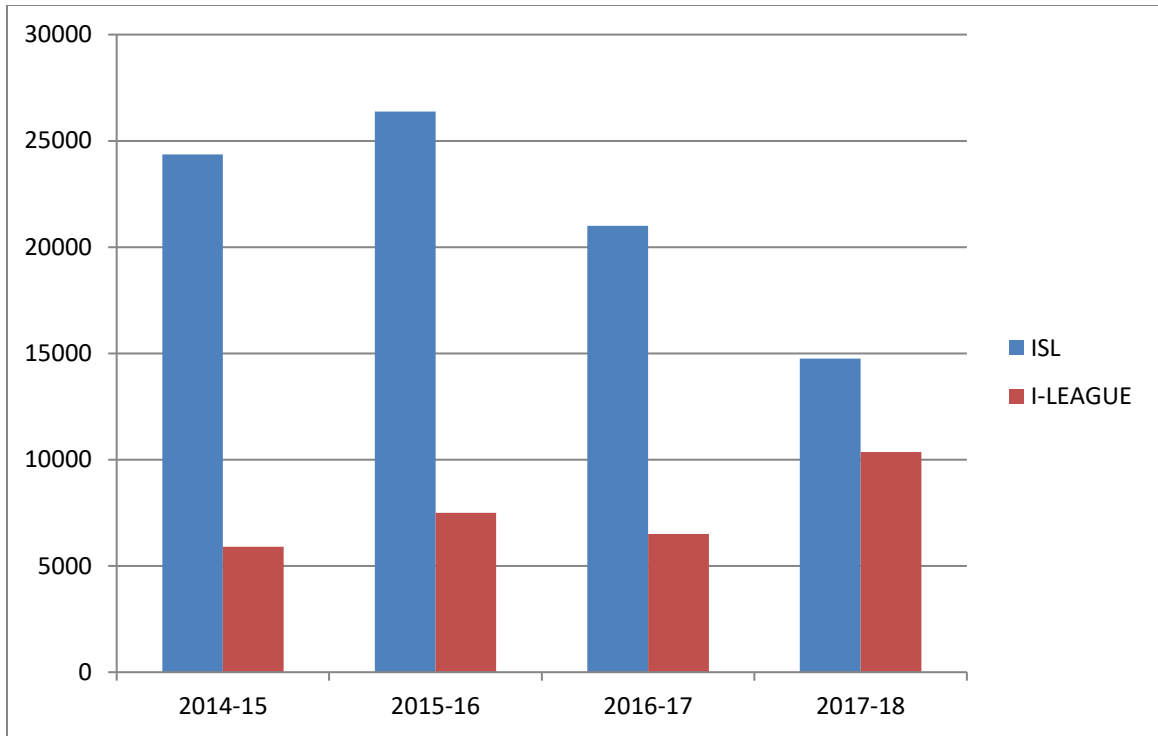
Indian Super League	
Social Conversation	475,372
Search	19,861,425
Facebook	4,200,000
Twitter	649,000
Instagram	326,000
TVR	0.3
Reach	158,866,000

Source – GroupM
ISL data is till 31st Jan 2018

Figure 1 Source for TVR and Reach - BARC

- The pioneer league of Indian football though has drawn millions of fans in the stadium, it is no match to ISL when it comes to television viewership despite being mentioned on papers as the top tier of Indian football. Star Sports is not “contractually obligated” to telecast all the games. Also, the All India Football Federation does not have the final say in the telecast of matches. Star Sports announced it would broadcast only 80 of the 110 I-League games this season. In 2018-19, the I-League attracted 17.4 million viewers for the first 46 matches, while the ISL viewership was more than seven times higher. The precise reasons for such disparity are that ISL timings and broadcast quality are better with more money involved. Although the I-League has done considerably well in increasing the football footprint in India — from Kashmir, North East, and from the south, it is still plagued with lack of good sponsors and media attention.
- NEROCA’s promotion to the I-League helped the competition get a major boost in its attendance figures. With an average home attendance of 24,494, NEROCA helped raise the average in the I-League from 6,500 in 2016/17 to 10,354 the last season. The entry of Gokulam Kerala FC too contributed as did games of Chennai City in Coimbatore, champions Minerva Punjab FC and the return of club football to the Salt Lake stadium. This, despite two-fifths of the league’s matches being afternoon kickoffs with a vast majority of them being played on weekdays. In contrast, the average attendance in the ISL fell to 14,750. The league phase saw an average of 14,495 fans while the semi-final and the final had an average of 19,351. This is a steep fall from the average of 24,357 recorded in the first season and 26,376 in the second. The third season of ISL had an average attendance of 21,003. NorthEast United, which witnessed packed stands in the first season, failed to fill even one-third of the stadium in 2017-18. On their return to the Salt Lake stadium ATK, having spectacularly imploded after severing ties with Atletico Madrid, struggled to generate interest anywhere near the first two seasons. Two of the three highest average attendance figures in ISL were recorded at the home of the two debutants. While Bengaluru FC have built a strong fan base over the years, it remains to

be seen whether Jamshedpur FC and the other clubs are able to sustain theirs as seasons get longer.



PRIZE MONEY

ISL

CHAMPION - 8 CRORES

1ST RUNNERS UP - 4 CRORES

2ND RUNNERS UP - 1.5 CRORES

4TH - 1.5 CRORES

GOLDEN BOOT - 2.5 LAKH

GOLDEN GLOVE - 2.5 LAKH

HERO OF THE LEAGUE - 5 LAKH

WINNING PASS OF THE LEAGUE - 1 LAKH

I-LEAGUE

CHAMPION - 1 CRORE

1ST RUNNERS UP - 60 LAKH

2ND RUNNERS UP - 40 LAKH

4TH - 25 LAKH

MATCHDAY SUBSIDY - 1 LAKH

MATCH WINNER - 50 THOUSAND

HERO OF THE MATCH - 25 THOUSAND

J1-LEAGUE

Champions: 300,000,000 yen, Second place: 120,000,000 yen, Third place: 60,000,000 yen

Addition to the prize, top 4 clubs are awarded with the following funds money.

J league funds distributed to top 4 clubs (from 2017)

Champions: 1,550,000,000 yen

Second place: 700,000,000 yen

Third place: 350,000,000 yen, Fourth place: 180,000,000 yen

Average annual player salary in Japan football league 2017

Average annual player salary in Japan football league 2017

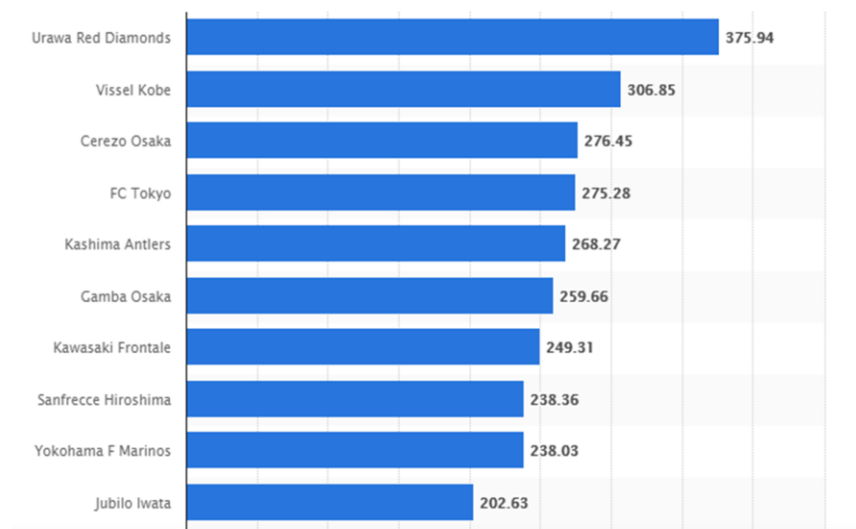


Figure 2© Statista 2019

Total annual revenue of J league (IN Billion Yen) by division in 2017

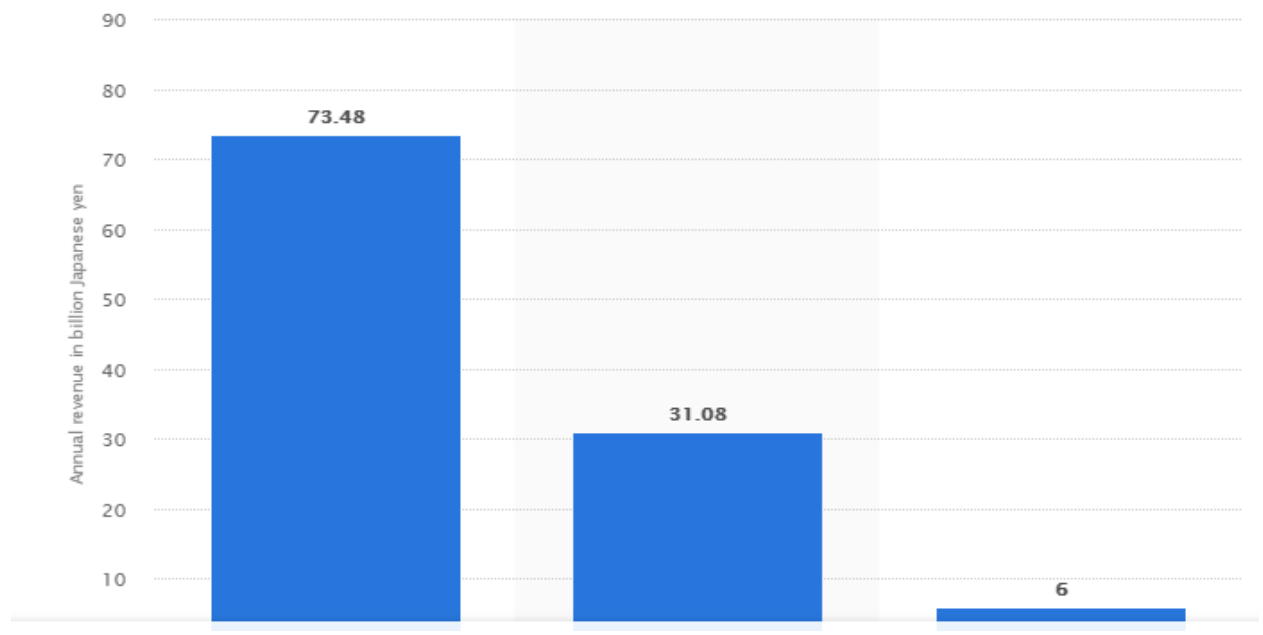


Figure 3© Statista 2019

LEAGUE STATS 2018	J- LEAGUE	ISL	I- LEAGUE
MATCHES PLAYED	306	95	109
GOALS SCORED	813	254	303
AVERAGE GOALS SCORED	2.65	2.67	2.77
AVERAGE ATTENDANCE	19,064	13,155	10,223
HIGHEST ATTENDANCE	55,689	41,202	64,867
LOWEST ATTENDANCE	6189	3134	100
TOTAL ATTENDANCE	5,833,538	1,131,304	1,114,349

SOURCES OF EARNING OF FOOTBALL CLUBS INDIA

- Sponsorship - Respected deals of the parent owner companies.
- Ticket sales and match day earnings - Not all clubs in India own their own stadium and are dependent upon what the AIFF provides per match. Rs 75,000 for hosting a home game and Rs 2000 per person for away games. Also as stadiums are not owned it cannot be given on rent for other activities.
- Broadcasting rights - As Star is the owner of the leagues it pockets the broadcast revenue and provides to the club according to the viewers. Money does not directly go the clubs like major foreign league who sell their own broadcast.
- Player trading and transfer fees - Transfer fees per team have been capped by the ISL and this is the most at which the clubs earn.
- Merchandise.
- Winning prize money for various selected criteria.
- To and fro airfare for away games is also provided by AIFF.

5.1 SUMMING UP

The next chapter contains the conclusion of this research paper.

CHAPTER 6
CONCLUSION

Indian football grew at a steady pace after the introduction of I-League in 2007. However I-League clubs as years went by failed to attract sponsorship and TV viewership. Hence a franchise based league ISL was introduced in 2013. ISL attracted better sponsorships and viewers across the nation. Though as seasons went by the numbers started decreasing with lackluster rules of the league as there is no promotion and relegation. At this time I-League clubs were not getting that much attention on the TV but their stadium attendances were rising due to competitiveness of the league. Stats show it is the most competitive league in Asia in the last 5 years. Major I-League clubs and football enthusiasts have called for merging of both the professional leagues for better competitiveness and increased promotions. But as ISL franchises were sold for a period of 10 years the teams cannot be relegated for this period and hence proves a major hurdle.

Odisha state government came forward with signing a deal with AIFF for hosting of Indian national team games as its home ground. This will help in increased facilitation of infrastructure and facility development. Broadcast revenue is major earning source of football clubs across countries but in India as Hero is the owner all the broadcast revenue is collected by it. India have discontinued the compulsion of a marquee player as it does not affect the team performances but increases the wage bill. However Japan still follows it with latest marquee players being Iniesta, Torres and Podolski. Japan have found huge success in community based and regionalizing football. Japan does not have national sponsors for its team rather have regional sponsors to be compulsory sought for improvement of football and help in global footprint of those companies. Average age of Indians playing in ISL is higher than that of Japan but as years will go by it is bound to decrease with India's increased spend at the grassroots levels.

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