

## TENDER SPECIFICATIONS

# STUDY ON THE IMPACT AND INTEGRATION OF PADEL AND PICKLEBALL AS VARIANTS OF TENNIS IN SINGAPORE

---



# SINGAPORE TENNIS ASSOCIATION

15 Stadium Walk #01-03 (Kallang Tennis Hub) Singapore 397694 Tel: 65-6295 2283

Email: [info@singtennis.org.sg](mailto:info@singtennis.org.sg) Website: <http://www.singtennis.org.sg> GST Reg. No.: M90068048L

## REQUIREMENT SPECIFICATIONS

### 1 BACKGROUND

The Singapore Tennis Association (STA), as the National Sports Association for tennis in Singapore, is undertaking a strategic study to assess the evolving landscape of racket sports.

While tennis remains the foundational sport, emerging disciplines such as padel and pickleball have experienced rapid global growth. These sports are increasingly viewed as variants within a broader racket sports ecosystem, influencing participation trends, facility usage, and commercial models.

This study will be Singapore-centric, with a strong emphasis on:

- Local participation, infrastructure, and policy environment
- Alignment with national sport priorities
- STA's role in shaping a unified racket sports ecosystem

At the same time, the study must draw on global trends and international benchmarks, particularly from markets where multiple racket sports coexist or are integrated.

### 2 PURPOSE OF THE STUDY

The study aims to:

1. Analyse the current state of tennis in Singapore
2. Evaluate how padel and pickleball (as variants of racket sports) are evolving globally and regionally, and assess their current and potential impact within Singapore
3. Provide recommendations on whether and how padel and pickleball (as variants of racket sports) can be:
  - Integrated under STA
  - Positioned as complementary variants of tennis
  - Leveraged to strengthen overall racket sport participation and sustainability

### 3 STUDY FRAMEWORK: SINGAPORE-CENTRIC WITH GLOBAL BENCHMARKING

#### (A) Singapore Core Analysis (Primary Focus)

- Participation trends across tennis, padel, and pickleball
- Facility availability and utilisation (e.g. Kallang Tennis Hub, ActiveSG centres)
- Existing operators and ecosystem landscape
- Policy and funding environment



# SINGAPORE TENNIS ASSOCIATION

15 Stadium Walk #01-03 (Kallang Tennis Hub) Singapore 397694 Tel: 65-6295 2283

Email: [info@singtennis.org.sg](mailto:info@singtennis.org.sg) Website: <http://www.singtennis.org.sg> GST Reg. No.: M90068048L

## REQUIREMENT SPECIFICATIONS

- Demand projections for racket sports

### (B) Global & Regional Benchmarking (Comparative Layer)

The consultant shall analyse key international markets where racket sports coexist or are integrated, including:

- Spain (padel ecosystem)
- United States (pickleball growth model)
- UAE / Middle East (facility-led hybrid models)
- Australia (multi-sport community integration)

Focus areas:

- Governance structures
- Facility optimisation models
- Participation growth drivers
- Commercial and event ecosystems

## 4 SCOPE OF WORK

### 4.1 Tennis Positioning in Singapore

- Participation base and demographics
- Pathway strength (grassroots to high performance)
- Facility capacity and constraints
- Sustainability considerations

### 4.2 Padel and Pickleball in Singapore

- Adoption levels and growth trajectory
- Existing infrastructure and operators
- Barriers to growth (land, cost, policy)

### 4.3 Global Trends in Racket Sport Variants

- Participation growth and adoption drivers
- Accessibility vs tennis
- Sustainability of each sport

### 4.4 Impact Assessment (Singapore Context)

- Substitution vs complementary effects
- Impact on facilities, coaching, and pathways
- Participation expansion vs cannibalisation

### 4.5 Strategic Positioning as Variants of Tennis

- Feasibility of positioning padel and pickleball within a unified framework
- Governance implications
- Alignment with international bodies



# SINGAPORE TENNIS ASSOCIATION

15 Stadium Walk #01-03 (Kallang Tennis Hub) Singapore 397694 Tel: 65-6295 2283

Email: [info@singtennis.org.sg](mailto:info@singtennis.org.sg) Website: <http://www.singtennis.org.sg> GST Reg. No.: M90068048L

## REQUIREMENT SPECIFICATIONS

- Unified participation and ranking considerations

### 4.6 Facility & Infrastructure Strategy

- Optimal mix of tennis, padel, and pickleball
- Conversion vs new build analysis
- Multi-use facility models

### 4.7 Strategic Options

The consultant shall propose:

- Option 1: Tennis-led ecosystem (limited integration)
- Option 2: Multi-racket governance under STA
- Option 3: Hybrid partnership model

Each option must include risks, benefits, and implementation requirements.

In addition, the consultant shall:

- Identify a recommended option (preferred end-state) based on evidence and stakeholder considerations
- Propose clear strategic pathways and implementation steps required to achieve the recommended option
- Outline transitional considerations, including stakeholder alignment, policy adjustments, and phased implementation where applicable

## 5. KEY DELIVERABLES

### 5.1 Inception Report

- Methodology and workplan
- Stakeholder engagement plan

### 5.2 Interim Findings Report & Presentation

- Early Singapore insights
- Initial global benchmarking
- Presentation to STA management

### 5.3 Final Report

- Comprehensive analysis
- Strategic recommendations

### 5.4 Executive Presentations

#### (A) STA Board Presentation

- Strategic options and recommendations



# SINGAPORE TENNIS ASSOCIATION

15 Stadium Walk #01-03 (Kallang Tennis Hub) Singapore 397694 Tel: 65-6295 2283  
Email: info@singtennis.org.sg Website: http://www.singtennis.org.sg GST Reg. No.: M90068048L

## REQUIREMENT SPECIFICATIONS

### (B) Presentation to Sport Singapore

- Policy-aligned presentation covering:
  - Participation growth
  - Facility optimisation
  - Governance alignment
  - National ecosystem development

#### Consultants must:

- Align content with STA prior to presentation
- Tailor outputs to national sport priorities
- Be present for stakeholder engagement and Q&A

### 5.5 Strategic Positioning Paper

- “Singapore Racket Sports Ecosystem” framework
- STA’s role as coordinating body

### 5.6 Implementation Roadmap

- Short (1–2 years), medium (3–5 years), long-term (5–10 years)
- Policy and stakeholder alignment
- Pilot initiatives

## 6 PROJECT TIMELINE AND MILESTONES

The study is expected to be completed within 12 to 16 weeks.

Phase	Deliverable	Timeline
Phase 1	Kick-off & Inception Report	Within 2 weeks
Phase 2	Singapore Data Collection	Weeks 2–6
Phase 3	Global Benchmarking	Weeks 4–8
Phase 4	Interim Presentation (STA)	Weeks 6–8
Phase 5	Draft Final Report	Weeks 10–12
Phase 6	Final Report	Weeks 12–14
Phase 7	STA Board Presentation	Weeks 14–16
Phase 8	Presentation to Sport Singapore	Within 2 weeks post-finalisation

### Timeline Considerations

Proposals should demonstrate:

- Ability to prioritise Singapore insights early
- Parallel execution of global benchmarking
- Flexibility for stakeholder engagement timelines



# SINGAPORE TENNIS ASSOCIATION

15 Stadium Walk #01-03 (Kallang Tennis Hub) Singapore 397694 Tel: 65-6295 2283  
Email: info@singtennis.org.sg Website: http://www.singtennis.org.sg GST Reg. No.: M90068048L

## REQUIREMENT SPECIFICATIONS

- Capacity to support iteration and refinement
- Readiness to deliver a policy-ready output for Sport Singapore

## 7 PROPOSAL REQUIREMENTS

Submissions should include:

- Company profile and relevant experience
- Methodology and approach
- Project team and roles
- Timeline
- Detailed fee proposal
- Relevant case studies

## 8 EVALUATION AND AWARD CRITERIA

Evaluation Framework

S/No	Criteria	Weightage
1	Understanding of Brief	25%
2	Methodology & Approach	20%
3	Relevant Experience	20%
4	Team Capability	10%
5	Price & Value for Money	25%

Price Consideration

STA will adopt a value-based approach, not awarding solely on lowest cost.

Proposals must include:

- Clear cost breakdown
- Assumptions and exclusions
- Justification of value

STA reserves the right to:

- Negotiate pricing
- Adjust scope
- Consider phased implementation



# SINGAPORE TENNIS ASSOCIATION

15 Stadium Walk #01-03 (Kallang Tennis Hub) Singapore 397694 Tel: 65-6295 2283  
Email: [info@singtennis.org.sg](mailto:info@singtennis.org.sg) Website: <http://www.singtennis.org.sg> GST Reg. No.: M90068048L

## REQUIREMENT SPECIFICATIONS

### Additional Considerations

- Ability to deliver Singapore-relevant insights from global trends
- Experience engaging government stakeholders, particularly Sport Singapore
- Strength in producing actionable, implementable strategies

### Conflict of Interest

### Bidders must declare any conflicts involving:

- Padel or pickleball operators
- Facility operators
- Competing organisations

## 9 AWARD AND APPOINTMENT

### STA reserves the right to:

- Not award the tender
- Appoint one or more consultants
- Amend the scope

Appointment is subject to internal approvals and agreement on final terms.

## 10 GUIDING PRINCIPLE

To strengthen the position of tennis while leveraging emerging variants to expand overall racket sport participation and ecosystem sustainability in Singapore.