FICCI



INDIAN TOURISM INFRASTRUCTURE

Investment Opportunities & Challenges

Acknowledgement

We extend our sincere gratitude to Shri Vinod Zutshi, Secretary (Former), Ministry of Tourism, Government of India for his contribution and support for preparing the report.



FOREWORD

Travel and tourism, the largest service industry in India was worth US$234bn in 2018 – a 19% year-on-year increase – the third largest foreign exchange earner for India with a 17.9% growth in Foreign Exchange Earnings (in Rupee Terms) in March 2018 over March 2017. According to The World Travel and Tourism Council, tourism generated ₹16.91 lakh crore (US$240 billion) or 9.2% of India's GDP in 2018 and supported 42.673 million jobs, 8.1% of its total employment. The sector is predicted to grow at an annual rate of 6.9% to ₹32.05 lakh crore (US$460 billion) by 2028 (9.9% of GDP).

The Ministry has been actively working towards the development of quality tourism infrastructure at various tourist destinations and circuits in the States / Union Territories by sanctioning expenditure budgets across schemes like SWADESH DARSHAN and PRASHAD. The Ministry of Tourism has been actively promoting India as a 365 days tourist destination with the introduction of niche tourism products in the country like Cruise, Adventure, Medical, Wellness, Golf, Polo, MICE Tourism, Eco-tourism, Film Tourism, Sustainable Tourism, etc. to overcome 'seasonality' challenge in tourism.

I am pleased to present the FICCI Knowledge Report "*Indian Tourism Infrastructure : Investment Opportunities & Challenges*" which highlights the current scenario, key facts and figures pertaining to the tourism sector in India. The report also showcases the initiatives undertaken by the Central & State Governments and suggestive recommendations to establish India as a global tourist hotspot.



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TABLE OF CONTENTS

1	**Executive Summary**	**9**
2	**About Tourism Industry**	**19**
2.1	India Tourism	19
2.2	Tourism Satellite Account (TSA)	20
2.3	Global Tourism	21
3.0	**Infrastructure Development Initiated by selected Central Ministries**	**23**
3.1.	Ministry of Tourism	23
3.2	Ministry of Civil Aviation	29
3.3	Ministry of Railways	33
4.0	**State Government's initiative towards Tourism Infrastructure**	**37**
4.1	Odisha	37
4.2	West Bengal	39
4.3	Madhya Pradesh	41
4.4	Gujarat	46
4.5	Karnataka	50
4.6	Delhi	54
4.7	Rajasthan	56
4.8	Uttar Pradesh	58
4.9	Maharashtra	63
4.10	Kerala	68
4.11	Goa	69
4.12	Andhra Pradesh	71
4.13	Telengana	72
4.14	Tamil Nadu	73
5.0	**Road Ahead**	**75**



1 | Executive Summary

Tourism in India is important for the country's economy and is growing rapidly. Travel & tourism is a ₹ 9.4 lakh crore industry in the country. The Travel and Tourism Competitiveness Index Report for the year 2017, ranked India 40th out of 136 countries overall. The report ranks the price competitiveness of India's tourism sector 10th out of 136 countries.

The year 2017 was a remarkable year for India as it received more than 10 million (10.04 million) foreign tourists for the first time, registering 14 per cent growth over 2016. From 2014 onwards Ministry of Tourism has started to compile the arrival of NRIs on annual basis & there were 5.51 million arrivals of NRIs in India during 2017. In concordance with UNWTO, the International Tourist Arrival (ITA) includes both FTAs and arrivals of NRIs. In the year of 2017, there were 15.54 million ITAs in India. The foreign tourist arrival in India during Jan to Nov 2018 was 9.367 million with a growth of 5.6 per cent over corresponding period of 2017. Domestic tourism continues to be an important contributor to the sector. As per the data furnished by State / UT Governments and other information available with the Ministry of Tourism, there were 1652.49 million domestic tourist visits all over the country during the year 2017.

During 2017, a total of 1.7 million foreign tourists arrived on e-Tourist Visa registering a growth of 57.2% over 2016 and the same was 2.1 million during January-November, 2018 registering a growth of 41.5% over the corresponding period of the previous year.

While the global economy grew by 3.2 per cent, the Travel & Tourism industry grew significantly more at 3.9 per cent. The World Travel and Tourism Council calculated that tourism generated ₹16.91 lakh crore (US$247 billion) or 9.2 per cent of India's GDP in 2018 and supported 42.673 million jobs, 8.1 per cent of its total employment. The sector is predicted to grow at an annual rate of 6.9 per cent to ₹32.05 lakh crore (US$460 billion) by 2028 (9.9 per cent of GDP).

Foreign Exchange Earnings (FEEs) has shown a growth of 19.1 per cent in US Dollar term against a modest growth of 7.5 per cent world-wide during 2017. India received an estimated US$ 27.31 billion during 2017 as FEEs through tourism and the same in Rupee term was ₹177874 crore with a growth of 15.4 per cent. During Jan-Nov in 2018, FEEs was ₹ 175423 crore with a growth of 10.7 per cent over the corresponding period of previous year.



Source: Compiled from Bureau of Immigration, Govt. of India

Strengthening Infrastructure- the key to growth in Indian Tourism

India has already made a place in world's tourism map because of its great potential to attract tourists to the diversity of tourist sites spread all over the country. It is also known that India still lay behind other neighboring countries like China, Singapore, Malaysia and Thailand because of inadequate infrastructure. Keeping in mind several shortcomings the following Central Ministries have undertaken specific initiatives to promote infrastructure:

Ministry of Tourism Initiatives

The Ministry of Tourism is the nodal agency to formulate national policies and programmes for the development and promotion of tourism. The Ministry has allocated a budget of INR 2189.22 crore for 2019 – 20 as a provision to meet the expenditures of the various programs to be undertaken by the Ministry. Under the SWADESH DARSHAN scheme, a total of 15 thematic circuits have been identified for development, namely: North-East India Circuit, Buddhist Circuit, Himalayan Circuit, Coastal Circuit, Krishna Circuit, Desert Circuit, Tribal Circuit, Eco Circuit, Wildlife Circuit, Rural Circuit, Spiritual Circuit, Ramayana Circuit, Heritage Circuit, Tirthankar Circuit & Sufi Circuit. Since the inception of the scheme in 2014-15, an amount of ₹ 5873.26 crore has been sanctioned for 73 projects with a total release of ₹ 2769.25 crore (till 14.12.2018) covering all thematic circuits under the Swadesh Darshan Scheme.

Holistic development of identified pilgrimage destinations is being undertaken under the 'National Mission on Pilgrimage Rejuvenation and Spiritual, Heritage Augmentation Drive' (PRASHAD) Scheme. Under the PRASHAD scheme, 41 sites across 25 states have been identified for holistic development of pilgrimage destination. Since the launch of the scheme in 2014-15, an amount of ₹ 727.16 crore has been sanctioned for 24 projects with a total release of ₹ 342.91 crore till 13.12.2018.
Ministry of Tourism has recently launched the 'Adopt A Heritage' project. Heritage sites are being offered for adoption by the public sector, private sector and individuals to become 'Monument Mitras' for developing amenities and facilities at these sites under this programme.
Creation of 'Special Tourism Zones' anchored on Special Purpose Vehicles (SPVs) in partnership with the States was announced in the Budget for 2017-18. Creation of Special Tourism Zones would lead to overall development of the areas.
Ministry of Tourism launched "Incredible India 2.0 Campaign" which marks a shift from the present generic promotions being undertaken across the world, to market specific promotional plans and product specific creative, with greater focus on digital presence and social media
Ministry of Tourism has sanctioned an amount of Rs. 2499.98 Lakh for developing tourist amenities at Madgaon, Karmali and Thivim railway stations in Goa considering the importance of the Konkan Rail route from tourism angle.
Pursuant to Budget Announcements of 2018-19, Ministry of Tourism has identified 17 iconic sites in the country for development under Iconic Tourist Sites Development Project. These are namely, Taj Mahal, Fatehpur Sikri, Ajanta - Ellora, Humayun Tomb, Qutab Minar, Red Fort, Amer Fort, Somnath, Khajuraho, Hampi, Mahablipuram, Kaziranga, Kumarakom, Colva Beach and Mahabodhi Temple.
The Ministry of Tourism extends financial support of up to ₹ 50 lakh per State and ₹ 30 lakh per UT under the Domestic Publicity and Promotion including Hospitality Scheme for organising fairs/ festivals/ tourism related events. A total of ₹ 6.08 crore has been released to various States/UTs for organising fairs and festivals during 2018 (till 14.12.2018).
Ministry of Tourism extended its financial support to Central Agencies like ASI, Port Trusts in India, India Tourism Development Corporation (ITDC) etc. to develop the potential destinations under their jurisdictions. A total of Rs 44.53 crore has been released to various Central Agencies for creation of tourism infrastructure related projects during 2018 (till 14.12.2018).
Ministry of Tourism has taken up the initiative of identification, diversification, development and promotion of niche tourism products of the country like Cruise, Adventure, Medical, Wellness, Golf, Polo, Meetings Incentives Conferences & Exhibitions (MICE), Eco-tourism, Film Tourism, Sustainable Tourism, etc. to overcome 'seasonality' challenge in tourism and to promote India as a 365 days tourist destination.

Ministry of Civil Aviation Initiatives
National Civil Aviation Policy 2016 – 1st comprehensive policy to accelerate growth of an integrated aviation ecosystem, India to be 3rd largest aviation market by 2022
Affordable Flying for all – Fall in average airfare by 18% in 2016 over 2015 making air travel affordable for everyone with unprecedented capacity enhancement in aviation system. As per estimates shared by DGCA Civil Aviation Statistics, the domestic air passenger traffic was 123.32 million in FY 18, thereby registering a growth of 19.4% CAGR from FY 14. On a similar note, international air passenger traffic was 60.58 million in FY 18, thereby registering a growth of 8.89% CAGR from FY 14. Furthermore, the distance flown by Scheduled operators rose to 19,941 crore km (FY 18) from 11,404 crore km (FY 14), recording 15% CAGR growth.
Significant improvements in passenger convenience – Passenger friendly initiatives such as AirSewa, removal of baggage stamping, etc., to provide a delightful air travel experience
Regional Connectivity Scheme to extend flight connection to Tier 3 and Tier 4 towns with maximum airfare for 50% of seats on UDAN flights capped ₹2,500 for one hour of flying. Over 40 lakh seat capacity created for UDAN flights across 30 unserved and underserved airports. The UDAN scheme has sparked massive increase in helicopter services in hilly areas and islands through use of 31 heliports. ₹4,500 crore earmarked for revival and upgradation of UDAN airports, corpus of ₹300 crore raised to subsidise UDAN flights.
Ease of Doing Business – Reforms undertaken to simplify processes, attract investments and promote business opportunities across aviation
Robust Security Architecture – Ensuring fool-proof security without compromising on passenger convenience through stringent security audits and institutionalised mechanisms
Enhanced Skill Development – Clear focus to leverage India's human capital potential and create job opportunities in the growing aviation sector
Innovation in Technology – Conceptualization and development of cutting-edge products and processes across aviation ecosystem to enhance efficiency
The Ministry of Civil Aviation released a report entitled "Vision 2040" on 15 January 2019 outlining a roadmap for the future of civil aviation in India. The report projects that air passenger traffic will increase six-fold to 1.1 billion by 2040 carrying 821 million domestic and 303 million international passengers. The report estimates that a total of 2,359 aircraft would be required to server passengers in March 2040. The Ministry projected that the number of airports in India would rise from 101 in January 2019 to around 190-200 by March 2040 and an estimated 150,000 acres of land and US$ 40-50 billion of capital would be required for construction. The government proposed creating a $2 billion fund to help support low-traffic airports. The report also targets establishing an aircraft manufacturing base in India by 2040.

Ministry of Railways Initiatives
The Centre has set the overall capital expenditure programme for Indian Railways at Rs 1.58 lakh crore in 2019-20, from Rs 1.48 lakh crore the previous year, the highest ever for the national transporter.
FDI in Railways: The proposal has been cleared by Government for allowing 100 per cent FDI in Railway infrastructure, apart from operations, through automatic route.
National High-Speed Rail Corporation Limited, (A Joint Venture of Government of India and Participating State Governments for Implementing High Speed Rail Projects) is implementing the high-speed train corridor (popularly called the bullet trains) between Ahmedabad and Mumbai. The total length of proposed High-Speed Railway Corridor works out to be 508.17 km and it will be passing through the states of Maharashtra and Gujarat and the Union Territory of Dadra and Nagar Haveli. The proposed corridor lies in the Western Railway and this will commence from Bandra Kurla Complex in Mumbai and will end near Sabarmati Railway Station in Ahmedabad. The project will also enable creation of around 15 lakh jobs
Railway land leased out for horticulture and plantation of trees
New Catering Policy has been issued on 27th February 2017 with the objective to provide quality food to rail passengers by unbundling of catering services on trains.
Alternate Train Accommodation Scheme (ATAS) was conceptualized and introduced in November 2015 under the name "VIKALP"
Initiatives to Increase Non-Fare Revenue and To Promote Ease of Ticketing Through Digital Transactions Launched
SRESTHA - New R&D organisation to serve the future technology needs of Railways.
SUTRA World class data analytics, simulation softwares, network optimisation and decision support systems.
RAIL INVESTMENT AND PLANNING ORGANISATION - Develop and own the corporate medium term and long term plan, identify investment opportunities, standardize economic easements of projects and propose optimal modes of financing.
To improve station management and customer service and bring more commercial orientation to the organization, Station Directors have been posted at a number of major stations.
Initiatives for employee grievance redressal :- 1. Employee charter for time-bound redressal of employee grievances has been constituted. 2. 'NIVARAN' - online grievance redressal machinery has been instituted.

Ministry of Shipping Initiatives
During 2016-17, 57 Projects were awarded, involving an investment of Rs. 9490.51 crore and additional capacity of 103.52 MTPA was created. In 2017-18, 59 projects have been targeted for award of which 12 have already been awarded.
The Average Turnaround Time has improved from 87.36 Hrs in 2015-16 to 82.56 Hrs in 2016-17 and significant improvement to 63.33 Hrs during the 2017-18 (as on 31.10.2017).
The Average Output Per Ship Berthday has increased from 13156 Tonnes in 2015-16 to 14583Tonnes in 2016-17 and to 14912 Tonnes in 2017-18(as on 31.10.2017).
100% FDI is being allowed in PPP Projects in the Port Sector.
RFID system has already been put in place in Major Ports. Direct Port Delivery (DPD) volume is steadily growing. Further as part of the Swachh Bharat Abhiyan, Green agenda, new schemes have been formulated for providing financial assistance to Major Ports for green initiatives
100% cashless transaction have been achieved in all Major Ports, land records have been digitized, all ports pensioners linked with Aadhaar Biometric system etc.
'Jal Marg Vikas' (National Waterway-I: River Ganga) Project envisages to develop a fairway with upto 3 meters depth between Varanasi and Haldia covering a distance of 1380 kms at an estimated cost of Rs. 5369 crore.
The IWAI is focussing its energy on movement of cargo on the National Waterways so that by the time the terminals and other infrastructure are established they are utilized effectively.
Mandovi, Zuari, Camberjua, Barak, Gandak, Rupnarayan, Alappuzha-Kottayam-Athirampuzha Canal and Sunderbans National Waterways were considered for development during 2017-18.

Ministry of Road Transport and Highways
The construction targets for 2018-19 have been set at 16,418 km, of which 9698 km will be constructed by MoRTH, 6000 km by NHAI and 720 km by NHIDCL. The targets are 67% more than the 9829 kilometres length of National Highways constructed during 2017-18.
A total of 73 projects (8,310 km) worth an estimated investment of Rs.1,00,000 crore had been languishing for years due to various reasons. In order to put these projects back on track, the reasons for delay were identified and policy interventions undertaken to address the same.
The NHAI has created a National Highways Investment Promotion Cell (NHIPC) for attracting domestic and foreign investment for highways projects.
Bharatmala Pariyojana (Phase-I) is a new umbrella program for the highways sector that aims to optimize the efficiency of road traffic movement across the country by bridging critical infrastructure gaps.

In order to ensure safe and smooth flow of traffic, Ministry has envisaged a plan for replacement of Level Crossings on National Highways by ROBs/ RUBs under a scheme known as Setu Bharatam.
An inventory for more than 1,62,000 bridges and culverts has been completed. A total of 147 Bridges have been identified as distressed structures which call for immediate restoration/ replacements.
Mandovi, Zuari, Camberjua, Barak, Gandak, Rupnarayan, Alappuzha-Kottayam-Athirampuzha Canal and Sunderbans National Waterways were considered for development during 2017-18.

Ministry of Environment, Forest and Climate Change's initiatives
The progressiveness of the Government is evident from the commitment to sustainable development which is evident from the financial allocation for development of forests and wildlife in the country.
New technologies like GPS, GIS and remote sensing have been used in the forestry sector for better protection and management of the resource.
There is a system of forest fire detection in the country implemented by Forest Survey of India, Dehradun based on remote sensing technology which can detect and disseminate information about forest fires in near real time.
Forest Protection Division constituted the committee to monitor the progress of Application of Space Technology in the Ministry including launching of a dedicated forest satellite.

Ministry of External Affairs initiatives
In order to streamline, liberalize and ease the process of issue of passport, the Ministry of External Affairs has taken a number of steps in the realm of passport policy which is expected to benefit the citizens of India applying for a passport.
Registration for Kailash Manasarovar Yatra organized by Ministry of External Affairs.
In pursuance of "good governance" initiatives, the Ministry of External Affairs has launched an online Consular Grievances Monitoring System, named MADAD,
India's development assistance has started to cover large number of countries and consequently, the projects being implemented by the Ministry of External Affairs have increased substantially.

Ministry of Culture initiatives
The Scheme covers all 'not-for-profit' organizations, NGOs, Societies, Trusts, Universities and individual for supporting the Seminars, Conference, Research, Workshops, Festivals, Exhibitions, Symposia, Production of Dance, Drama-Theatre, Music etc. and small research projects on different aspects of Indian Culture.
Scheme is to acknowledge the achievements made by the employees of the Museums in order to encourage them to work hard in the pursuit of excellence.

"Scheme for Safeguarding the Intangible Heritage and Diverse Cultural Traditions of India", with the objective of reinvigorating and revitalizing various institutions, groups, individuals, identified non-MOC institutions, non-government organisations, researchers and scholars
India's development assistance has started to cover large number of countries and consequently, the projects being implemented by the Ministry of External Affairs have increased substantially.

Accommodation

The Government has also been making serious efforts to boost investments in hotel and tourism sector, 100 per cent FDI is allowed through the automatic route. A five-year tax holiday has been offered for 2, 3 and 4 star category hotels located around UNESCO World Heritage sites (except Delhi and Mumbai). Total FDI received by Indian hotel & tourism sector was US$ 12 billion between April 2000 and December 2018.

Way forward

To increase and facilitate travel to India, the government has placed significant emphasis on ground transportation and international openness. E-tourist visa has generated an increase in passenger arrivals to the country. While health conditions, human resources and technology readiness are improving, further progress is needed across these dimensions. Addressing tourist service infrastructure, security concerns and environmental sustainability are key for achieving India's travel and tourism potential. To reach its goal of becoming the world's largest aviation market by 2030 and welcoming 20 million foreign tourists by 2023, India must enhance its value proposition and foster a conducive environment. By doing so, it will be better able to build demand and attract tourists, while simultaneously creating adequate supply through the development of physical and digital infrastructure and progressive legislation.

I. Building demand for tourism

To enable India to increase its international arrivals and continue to generate employment opportunities to reach nearly 50 million new positions by 2027, emphasis should be placed on boosting demand for India as a destination. To do so, it is essential to create stimulating value propositions, foster a tourist friendly environment and brand the country as a "must-discover" destination.

II. Niche tourism

As India develops its value proposition for each of its niche tourism markets, it should consider four key areas, namely, the location of the stay, the activities at the destination, the ability to arrive to and commute within the destination, as well as the ease of interaction with the service provider.

The location of the stay could consist of traditional hotels, jungle resorts, houseboats, plantation estates, and even cave and tree houses. Activities spanning adventures, wellness, wildlife, culture and gastronomy should be developed to enable travellers to discover the real essence of the destination. Infrastructure and service providers should support that last mile transportation and uplift customer experience.

One niche area in which India already excels is medical tourism, thanks to the high-quality yet affordable healthcare it offers patients by world-class hospitals and tertiary care facilities. India's earnings from medical tourism could surpass $8 billion by 2020. Additionally, India's leadership in yoga and Ayurveda has opened up the wellness tourism space.

Similarly, ecotourism can be a win-win situation for local Indian communities and tourists, given that the country is a hotspot of biodiversity with a rich natural heritage. During their visit to India, tourists could spend time in national parks, wildlife sanctuaries and biosphere reserves, while also helping to maintain the ecosystem.

MICE Tourism continues to be one of the major revenue spinners of modern times. Not only it brings into play the various aspects of tourism into one solid concept but also allows the opportunity for the host city to develop its economy in leaps and bounds. The estimated market size of MICE in India is Rs37576 crores in which nearly 60% comes from MIC i.e. meeting, incentive and conference and there is tremendous potential to grow if India as destinations can be marketed well along with offering world class MICE infrastructure which is currently not adequate.

Finally, cruise tourism could emerge as an advantageous opportunity in light of India's 7,500 km coastline. Cruising is one of the most dynamic and fastest-growing segments of leisure travel, with an estimated market size of 1.2 million cruise visitors by 2030 according to Government of India projections.

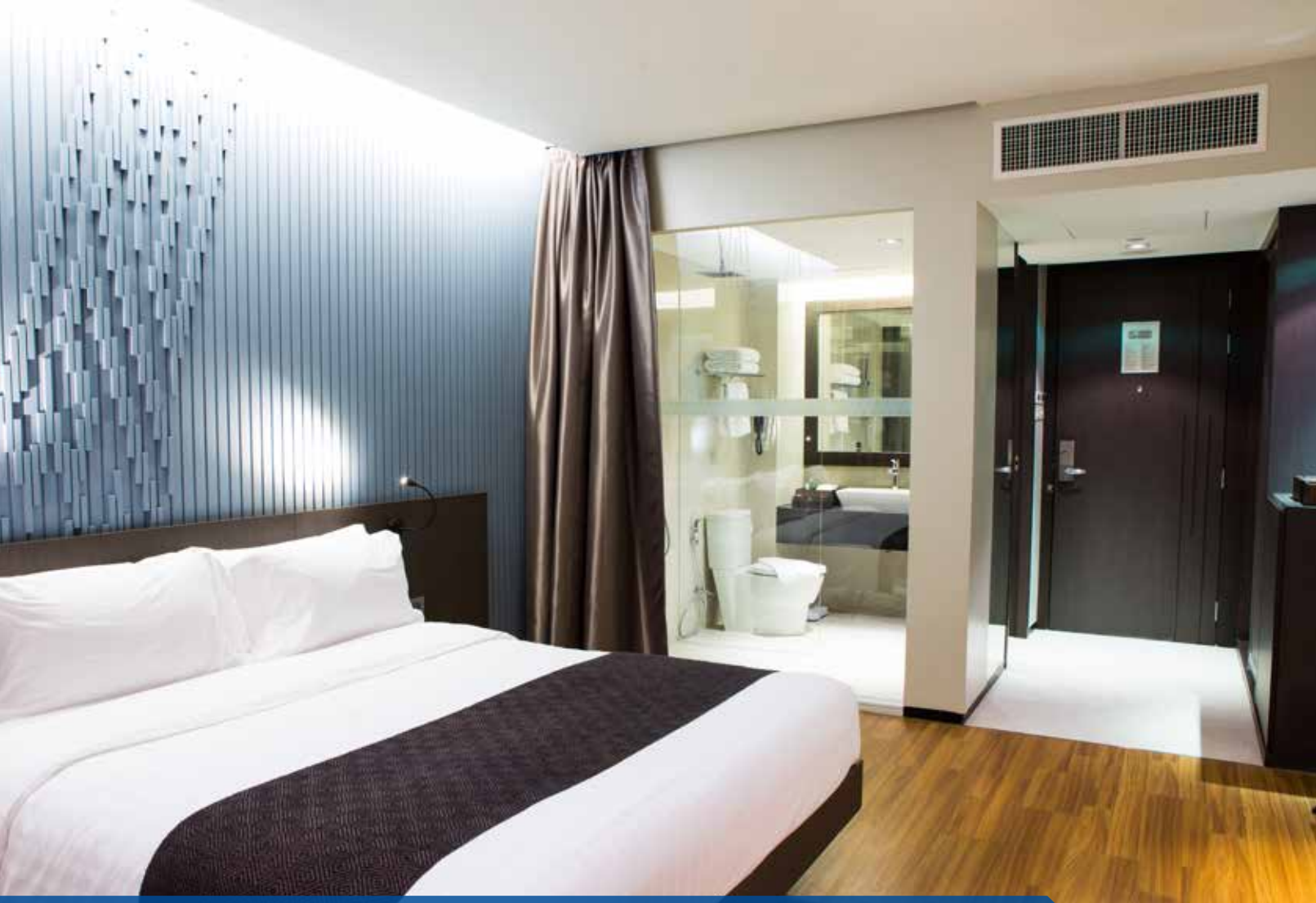
III. Branding tourist destinations

The States and Union Territories' must think about their branding their tourist destinations carefully to ensure it is perceived as authentic by tourists. India was very successful at creating a distinctive identity when it conceptualized and launched its Incredible India campaign. The campaign helped establish the country as a high-end destination, leading to a significant increase in tourist traffic.

IV. Involve Private Sector and engage actively

It is necessary to attract and involve Private Sector Investors through PPP mode which is financially viable. There is a need to initiate deep Involvement with the Private Sector players & allow deeper engagement. The owner can play a vital role for development of the tourism industry in India and have potential to create new destination hotspot for attracting new tourists from abroad. Such partnerships bring together different

objectives and skills, and resources in a formal or informal voluntary partnership to improve the attractiveness of destination, its value, associated market efficiency, and the overall management of tourism. The focus of Government to involve private sector to boost emerging themes like Cruise & Coastal tourism, Sports & Adventure, Religious, Medical & Wellness, Amusement & Theme parks and MICE Tourism.



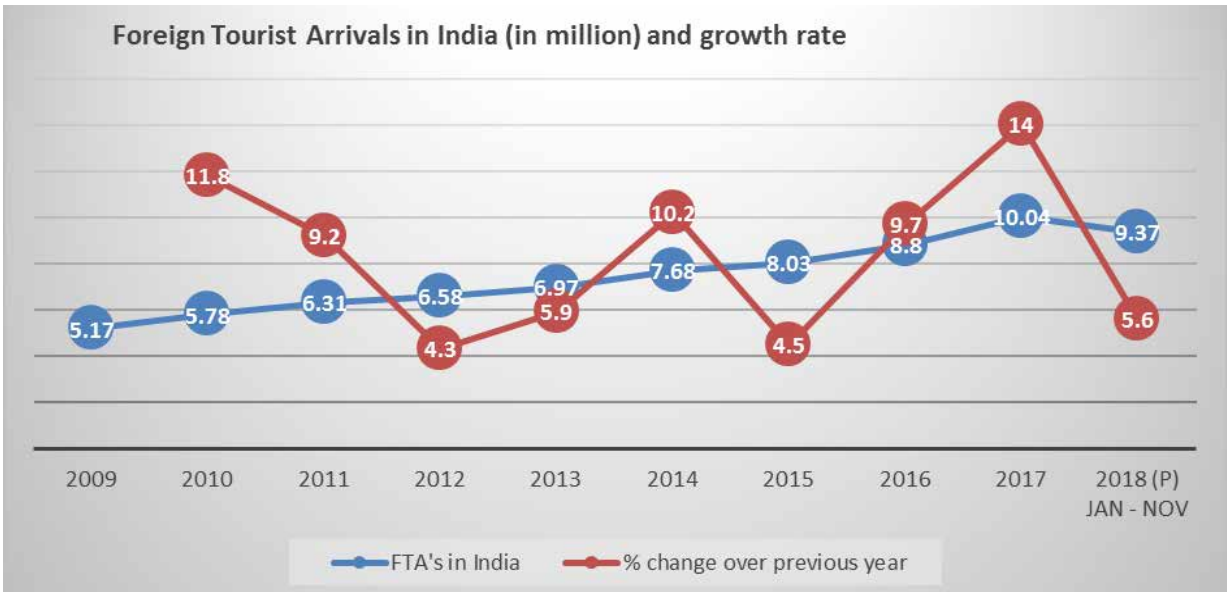
2 | About Tourism industry

2.1 India Tourism

Tourism in India is important for the country's economy and is growing rapidly. Travel & tourism is a ₹ 9.4 lakh crore industry in the country. The growing influence of the tourism sector as an economic powerhouse and its potential as a tool for development are irrefutable. Not only does the tourism sector spearhead growth, it also improves the quality of people's lives with its capacity to create large scale employment of diverse kind.

The Travel and Tourism Competitiveness Report for the year 2017, ranked India 40th out of 136 countries overall. The report ranks the price competitiveness of India's tourism sector 10th out of 136 countries. It mentions that India has quite good air transport (ranked 32nd), particularly given the country's stage of development, and reasonable ground transport infrastructure (ranked 29th).

The country also scores high on natural and cultural resources (ranked 9th). However, some other aspects of its tourism infrastructure remain somewhat underdeveloped. The nation has very few hotel rooms per capita by international comparison and low ATM penetration.



Source: Compiled from Bureau of Immigration, Govt. of India
"India's Tourism Statistics 2018 at a glance", Ministry of Tourism, India
Provincial Figures for 2018 from January to November 2018
Growth rate over same period of previous year - January to November 2018

With regards to tourism, the year 2017 was a remarkable year for India as it received more than 10 million (10.04 million) tourists for first time, registering 14 per cent growth in 2017 over 2016. From 2014 onwards Ministry of Tourism has started to compile the arrival of NRIs on annual basis & there were 5.51 million arrivals of NRIs in India during 2017. In concordance with UNWTO, the International Tourist Arrival (ITA) includes both FTAs and arrivals of NRIs. In the year of 2017, there were 15.54 million ITAs in India. The FTAs in India during Jan-Nov 2018 was 9.367 million (Provisional) with a growth of 5.6 per cent over corresponding period of 2017.

The Ministry of Tourism designs national policies for the development and promotion of tourism. In 2016, the Ministry started to derive purpose of Arrivals by clubbing various visa type categories in which foreign tourists travel to India. In 2017, as per analysis 59.3 per cent of foreign tourist arrivals were for the purpose of "Leisure, Holiday & Recreation" followed by Indian Diaspora (19.7 per cent) and Business and Professional (13.6 per cent). From 2014 onwards Ministry of Tourism has started to compile the arrivals of NRIs on annual basis and there were 5.51 million arrivals of NRIs in India during 2017. The numbers of Indian Nationals Departures from India, during 2017 were 23.94 million as compared to 21.87 million, during 2016, registering a growth of 9.5%.

Domestic tourism continues to be an important contributor to the sector. As per the data furnished by State / UT Governments and other information available with the Ministry of Tourism, there were 1652.49 million domestic tourist visits all over the country during the year 2017.

2.2. Tourism Satellite Account

The Tourism Satellite Account (TSA) of any country comprises of a set of 10 standard tables which are key to estimating the economic contribution of tourism in the economy. Tourism is a demand-based concept defined by its consumption not by its output. As per methodology

recommended by United Nations World Tourism Organisation, a framework has been developed by TSA following a standard broad methodology enabling international comparisons owing to the homogeneity among countries.

As per the report of 3rd Tourism Satellite Account for India (TSAI) prepared in 2018 for the reference year 2015-16 (using new base year, 2011-12 figures of Central Statistics Office) and subsequent estimation using them for the years, viz. 2013-14 and 2014-15, the estimates of contribution of tourism to GDP is as given below:

Table: Contribution of tourism to GDP

Reference Year	2013 - 14	2014 - 15	2015 - 16
Share in GDP (in %)	5.68	5.81	5.20
Direct (in %)	3.06	3.14	2.70
Indirect (in %)	2.62	2.67	2.50

TSA also provides the direct and indirect contribution of tourism in the employment of the country. According to 3rd TSA, the estimates of employment generated in the economy due to tourism during the year 2013-14, 2014-15, 2015-16, 2016-17 and 201718 is provided in the following table:

Table: Direct and indirect contribution of tourism towards employment in the country

Reference Year	2013 - 14	2014 - 15	2015 - 16	2016 - 17	2017 – 18
Share in Employment (in %)	11.90	12.09	12.38	12.19	12.38
Direct (in %)	5.19	5.27	5.40	5.32	5.40
Indirect (in %)	6.71	6.82	6.98	6.87	6.98
Employment (in million)	67.20	69.60	72.30	75.90	81.10

Source: Ministry of Tourism

2.3 Global Tourism industry

While the global economy grew by 3.2 per cent, the Travel & Tourism industry grew significantly more at 3.9 per cent. The World Travel and Tourism Council calculated that tourism generated ₹16.91 lakh crore (US$247 billion) or 9.2 per cent of India's GDP in 2018 and supported 42.673 million jobs, 8.1 per cent of its total employment. The sector is predicted to grow at an annual rate of 6.9 per cent to ₹32.05 lakh crore (US$460 billion) by 2028 (9.9 per cent of GDP). In October 2015, India's medical tourism sector was estimated to be worth US$3 billion, and it is projected to grow to US$7–8 billion by 2020.



Source: Compiled from Bureau of Immigration, Govt. of India
"India's Tourism Statistics 2018 at a glance", Ministry of Tourism, India
Provisional Figures for 2018 from January to November 2018

Foreign Exchange Earnings (FEEs) has shown a growth of 19.1 per cent in US Dollar term against a modest growth of 7.5 per cent world-wide during 2017. India received an estimated US $ 27.31 billion during 2017 as FEEs through tourism and the same in Rupee term was ₹1,77,874 crore with a growth of 15.4 per cent. During Jan-Nov in 2018, FEEs was ₹ 1,75,423 crore with a growth of 10.7 per cent over the corresponding period of previous year.

During 2017, a total of 1.7 million foreign tourists arrived on e-Tourist Visa registering a growth of 57.2% over 2016 and the same was 2.1 million during January-November, 2018 registering a growth of 41.5% over the corresponding period of the previous year.



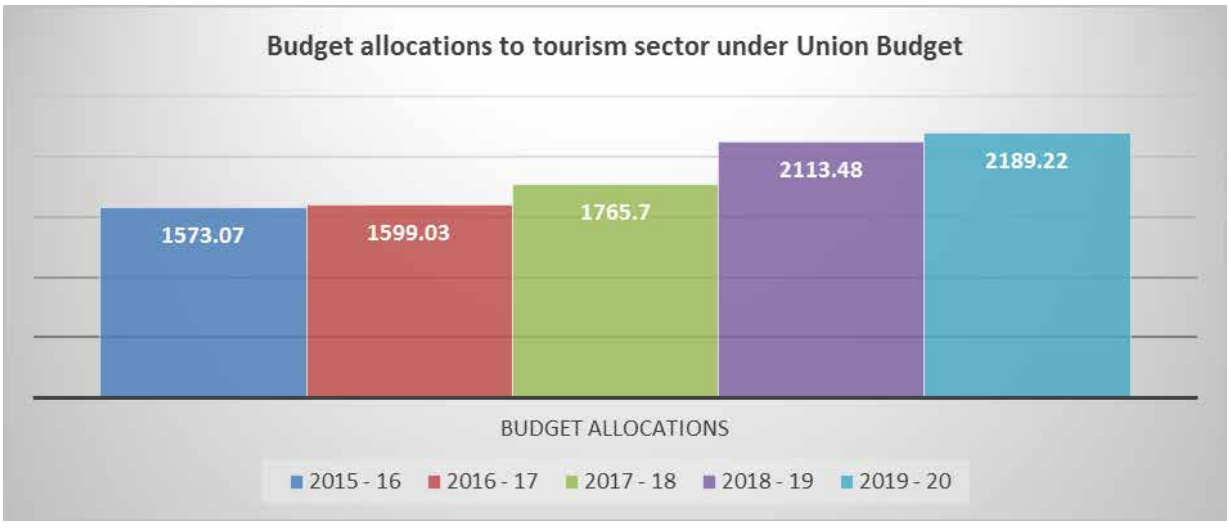
3 | Infrastructure Development initiated by selected Central Ministries

This section highlights the interventions of the select Central Ministries in promoting the tourism sector as a whole. In order to optimize connectivity; a strong supporting framework is needed.

The Ministry of Tourism along with Ministry of Civil Aviation and The Ministry of Railways are fostering various initiatives within that framework. The contribution of these Ministries to facilitate the growth of the tourism sector is discussed in the sections that follow.

3.1 Ministry of Tourism

The Ministry of Tourism is the nodal agency to formulate national policies and programmes for the development and promotion of tourism. The MOT has allocated a budget of INR 2189.22 crore for 2019 – 20 as a provision for meeting the expenditures related to the Ministry. The budget allocation to tourism in the last five years is shown in the figure below.



Source: Notes on Demands for Grants, 2019 – 20 Ministry of Tourism

In the process, the Ministry consults and collaborates with other stakeholders in the sector including various Central Ministries/ Agencies, State Governments/ Union Territory Administrations and the representatives of the private sector. A major portion of the budget is expected to be earmarked for Central Sector Schemes / Projects which will support tourism infrastructure.

Augmentation of infrastructure is the key to the expansion of tourism sector. The major portion of the Ministry's expenditure goes into the development of quality infrastructure relating to tourism at various tourist destinations and circuits spread around the States/ UTs. At present the following Schemes for Tourism Infrastructure creation are operative in the Ministry of Tourism. These are

Integrated Development of Tourist Circuits around Specific Themes - SWADESH DARSHAN:

Swadesh Darshan scheme, launched during 2014-15, was set up with a vision to develop theme-based tourist circuits on the principles of high tourist value, competitiveness and sustainability in an integrated manner by synergising efforts to focus on needs and concerns of all stakeholders to enrich tourist experience and enhance employment opportunities.

Under the scheme fifteen thematic circuits have been identified for development, namely: North-East India Circuit, Buddhist Circuit, Himalayan Circuit, Coastal Circuit, Krishna Circuit, Desert Circuit, Tribal Circuit, Eco Circuit, Wildlife Circuit, Rural Circuit, Spiritual Circuit, Ramayana Circuit, Heritage Circuit, Tirthankar Circuit & Sufi Circuit. Since the inception of the scheme, an amount of ₹ 5873.26 crore has been sanctioned for 73 projects with a total release of ₹ 2769.25 crore (till 14.12.2018) covering all thematic circuits under the Swadesh Darshan Scheme.

National Mission on Pilgrimage Rejuvenation and Spiritual, Heritage Augmentation Drive (PRASHAD):

The Scheme, launched during 2014-15, was set up with the objective of holistic development of identified pilgrimage and heritage destinations. Under PRASHAD scheme, 41 sites have been identified for development covering 25 states. Since the inception of the scheme, an amount of ₹ 727.16 crore has been sanctioned for 24 projects with a total release of ₹ 342.91 crore till 13.12.2018.

The scheme aimed at infrastructure development such as development / upgradation of destination entry points viz. passenger terminals (of road, rail and water transport), basic conveniences like tourism Information / Interpretation Centres with ATM/ Money exchange counters, improvement of road connectivity (last mile connectivity), procurement of equipment for eco-friendly modes of transport and equipment for tourist activities such as Light & Sound Show, water / adventure sports, renewable sources of energy for tourist infrastructure, parking facilities, toilets, cloak room facilities, waiting rooms, construction of craft haats / bazars / souvenir shops/cafeteria, rain shelters, watch towers, first aid centres, improvement in communication through establishing telephone booths, mobile services, internet connectivity, Wi-Fi hotspot.

In addition, Shoreline development & rejuvenation of natural water bodies have also been included.

ICONIC TOURIST SITES:

Pursuant to Budget Announcements of 2018-19, Ministry of Tourism has identified 17 iconic sites in the country for development under Iconic Tourist Sites Development Project and proposes to carry out the development of these sites in collaboration with various Central Ministries, State Governments, Urban Local Bodies, Local Community and Industry players/Private sector. These are

1. Taj Mahal (Uttar Pradesh) 2. Fatehpur Sikri (Uttar Pradesh) 3. Ajanta (Maharashtra) 4. Ellora (Maharashtra) 5. Humayun Tomb (Delhi) 6. Qutab Minar (Delhi) 7. Red Fort (Delhi) 8. Colva Beach (Goa) 9. Amer Fort (Rajasthan) 10. Somnath (Gujarat) 11. Dholavira (Gujarat) 12. Khajuraho (Madhya Pradesh) 13. Hampi (Karnataka) 14. Mahablipuram (Tamil Nadu) 15. Kaziranga (Assam) 16. Kumarakom (Kerala) and 17. Mahabodhi Temple (Bihar)

Assistance to Central Agencies for tourism infrastructure development:

Ministry of Tourism extended its financial support to Central Agencies like ASI, Port Trusts in India, India Tourism Development Corporation (ITDC) etc. to develop the potential destinations under their jurisdictions/control as overall development of places of tourist interest under their control may not be possible through their own resources. A total of Rs 44.53 crore has been released to various Central Agencies for creation of tourism infrastructure related projects during 2018 (till 14.12.2018).

Assistance for Organizing fairs / festivals/ tourism related events:

The Ministry of Tourism extends financial support of upto ₹ 50 lakh per State and ₹ 30 lakh per UT under the Domestic Publicity and Promotion including Hospitality Scheme for organising fairs/ festivals/ tourism related events. A total of ₹ 6.08 crore has been released to various States/ UTs for organising fairs and festivals during 2018 (till 14.12.2018).

Initiatives from Ministry of Tourism, Government of India

E- Visa:

The Ministry of Tourism has been working very closely with Ministry of Home Affairs and Ministry of External Affairs for easing of the Visa Regime in the country over a period of time. The Government of India launched the e - Visa on 27.11.2014. The e-Tourist Visa was introduced in September 2014 for 46 countries. As on December, 2017, e–Visa facility had been extended to the nationals of 166 countries with five sub-categories i.e. 'e-Tourist Visa', 'e-Business Visa', 'e-Medical Visa', "e-Conference Visa" and "e-Medical Attendant Visa". The latest additions in extending e- Visa facility includes the countries of Iran, Kyrgyzstan and Qatar.

Incredible India campaign:

The Ministry of Tourism launched the new Incredible India website (https://www. incredibleindia. org) on 14th June 2018. The website showcases India as a holistic destination, revolving around major experiences, such as, spirituality, heritage, adventure, culture, yoga, wellness and more. The website follows the trends and technologies of international standards with an aim to project India as a "must-visit" destination, among its overseas traveller

The "Incredible India 2.0" Campaign of the Ministry marks a shift from the generic promotions being undertaken across the world to market specific promotional plans and content creation. The Campaign covers the important source markets for Indian tourism and also takes into account emerging markets with significant potential. Thematic creatives on different Niche products being produced are being used in the Campaign.

Incredible India mobile application, launched on 27 September 2018 is a Hybrid Application for easy navigation and accessibility of content with features like Maps, Emergency response, Favourite destinations that are embedded in mobile applications to assist tourist during journey. Information regarding upcoming events will be notified to the user which will ensure that the tourist is updated on the go about recent events.

During the inaugural session of the Buddhist conclave on 23 August 2018, the Ministry has launched website Indiathelandofbuddha.in. The website highlighted footsteps of Buddha, Heritage sites and Buddhist monasteries.

International Buddhist Conclave

The Ministry of Tourism, organized the International Buddhist Conclave (IBC) on the theme, "Buddha Path – The Living Heritage in collaboration with the State Governments of Maharashtra, Bihar and Uttar Pradesh from 23rd – 26th August, 2018 at New Delhi, Ajanta (Maharashtra), followed by site visits to Rajgir, Nalanda and Bodhgaya (Bihar) and Sarnath (Uttar Pradesh). The idea was to showcase and project Buddhist Heritage in India and boost tourism to the Buddhist sites in the country and cultivate friendly ties with countries and communities interested in Buddhism. Japan was the 'Partner Country' at IBC 2018. During the inaugural session of the Conclave, the Ministry launched its website Indiathelandofbuddha.in and a new 60 second film showcasing the Buddhist sites in the country.

New Tourism products (Niche Tourism):

Ministry of Tourism has taken up the initiative of identification, diversification, development and promotion of niche tourism products of the country like Cruise, Adventure, Medical, Wellness, Golf, Polo, Meetings Incentives Conferences & Exhibitions (MICE), Eco-tourism, and Film Tourism to overcome 'seasonality' challenge in tourism and to promote India as a 365 days tourist destination.

International Yoga Day

The Ministry of Tourism organizes International Day of Yoga on 21st June. The fourth edition of International Day of Yoga was organised on 21st June 2018 at the Iconic Qutab Minar complex in Delhi with the participation of 33 international guests of Media personnel/ Tour operators/ Photographers/ Opinion makers from all over the globe. The programme followed by a Familiarization (FAM) trip covering Delhi, Pune and Lonavala.

Development of Medical Tourism

The Ministry has constituted a National Medical & Wellness Tourism Board with the Hon'ble Minister (Tourism) as its Chairman in order to provide dedicated institutional framework to take forward the cause of promotion of Medical Tourism, Wellness Tourism and Yoga, Ayurveda Tourism and any other format of Indian system of medicine covered by Ayurveda, Yoga, Unani,

Siddha and Homeopathy (AYUSH),. The Board works as an umbrella organization that promotes this segment of tourism in an organized manner. The 4th meeting of the National Medical and Wellness Tourism Board was held on 12.04.2018.

24 X 7 Tourist helpline:

Since February 2016, a 24x7 Toll Free Multilingual Tourist Info Line (1800111363 or on a short code 1363) is being run by the Ministry of Tourism in 10 International Languages besides Hindi & English for providing information relating to Travel & Tourism in India to the domestic and International tourists to assist them while travelling in India. The calls made by tourists (both international and domestic) while in India are free of charge.

The call centre handles international languages, namely Arabic, French, German, Italian, Japanese, Korean, Chinese, Portuguese, Russian and Spanish, in addition to English and Hindi. Till 26.11.2018, a total of 4, 93, 127 queries have already been received and handled in the Multilingual Infoline.

Swachh Bharat Mission

The Ministry has framed its "Swachhta Action Plan"(SAP) involving 3 different activities of creating cleanliness awareness among tourists, students, teachers, school /college staffs, stake-holders of tourist centers, pilgrimage centers, famous archaeological monuments etc.

These activities are being implemented at 180 sites at selected 29 states/ UTs during 2018-19. During the period from January, 2018 to November, 2018 a total of 370 activities had been undertaken by Indian Institute of Travel and Tourism, Gwalior.

To encourage State Governments to maintain the tourist place clean, a new award category titled "Swachhta Award" and "Best Civic Management of a Tourist Destination Award" have also been instituted by the Ministry for best maintained tourist place in the country in the National Tourism Awards.

Adopt a heritage

The 'Adopt A Heritage: Apni Dharohar, Apni Pehchaan', a collaborative effort by Ministry of Tourism, Ministry of Culture and Archaeological Survey of India (ASI), States / UTs, envisages developing heritage sites and making them tourist friendly, to enhance tourism potential and cultural importance in a planned and phased manner. It aims to encourage public sector companies, private sector companies and corporate citizens / NGOs / individuals to take up the responsibility.

The response to the project has been very encouraging as agencies who have come forward for adoption includes not only public and private industry/individuals but also schools & law firms. A total of 580+ registrations has been received of which 35 agencies (referred as Monument Mitras) have been awarded Letters of Intent (LoI) to adopt a total of 106 monuments/ tourist sites across India. Ten MoUs have been signed for which implementation is in progress.

Participation in International Travel Fairs and Exhibitions

The Ministry of Tourism, through its India Tourism Offices Overseas endeavours to position India as a preferred tourism destination in the tourism generating markets to promote various tourism products and destinations and to increase India's share in the global tourism market. The

objectives are met through an integrated marketing and promotional strategy and a synergized campaign in association with the Travel Trade, State Governments and Indian Missions overseas.

The promotional activities include participation in Travel Fairs and Exhibitions; advertising in the local print, electronic and outdoor media; organizing Road Shows, India Evenings, Seminars & workshops; organizing and supporting Indian Food Festivals and cultural festivals; offering brochure support to tour operators, and joint advertising/joint promotions with airlines, tour operators and other organizations etc.

MEETINGS INCENTIVES CONFERENCES AND EXHIBITIONS (MICE):

The Ministry of Tourism has developed guidelines for extending financial support under Market Development Assistance (MDA) scheme to 'Active Members' of India Convention Promotion Bureau (ICPB) towards bidding for International Conferences/ Conventions, thereby bringing more MICE business to the country. Under the scheme, associations / societies are given financial support on winning the bid or obtaining second and third positions in the bidding process, subject to the terms and conditions.

During 2018, the Ministry of Tourism, participated in International Road Shows in various cities in Europe to promote India as a destination for Conference and Meeting- "MICE". These Road Shows were jointly organized by the Ministry of Tourism and India Conventions Promotion Bureau (ICPB) from 26th to 29th June 2018 at Paris, Brussels, Geneva and Zurich.

MICE tourism is set to grow and the country is in need of more Convention and Exhibition Centers to meet this requirement. To encourage investment and standardize facilities in these areas, the Ministry of Tourism has a scheme to provide funds for making Convention Centres.

Domestic Promotions and Publicity

The following Domestic Campaigns have been launched during 2018

- TV campaigns to promote tourism to North East Region and Jammu & Kashmir
- Digital outdoor campaign on "Swachhta" and publicising the "Statue of Unity"
- Radio, SMS, Print media advertisements to promote Bharat Parv 2018 and Paryatan Parv
- Photo contest "Musafir Hoon Yaaron" on Doordarshan to coincide with Paryatan Parv

Production of creatives and collaterals

- Promotional Films on Yoga, Wellness, Luxury, Cuisines, Wildlife, etc.
- Short Films / Television Commercials (TVCs) promoting Wellness, Adventure, Spirituality, Vintage Cars, Wildlife, Heritage, Nature, Royal Residences, produced in association with BBC
- Short Films / Television Commercials (TVCs) on Red Fort, Qutab Minar, Badrinath, Kedarnath, Gangotri, Yamunotri, Beaches of Goa, Churches & Convents of Old Goa, Ahmedabad Heritage City, Sanchi, Bhimbetka, Elephanta Caves, Somnath, Konark, Thanjavur and Konark produced in association with Discovery Channel.
- Wall Calendar 2018 on the theme "India at Night" and Desk Calendar 2018 on the theme "India for Everyone".

3.2 Ministry of Civil Aviation

During the last three years, the Civil Aviation industry in India has emerged as one of the fastest growing industries in the country. India is today considered as the third largest domestic civil aviation market in the world. As per International Air Transport Association (IATA) forecasts, India is expected to overtake UK to become the third largest air passenger in International and Domestic market by 2024.

The Directorate General of Civil Aviation is the regulatory body governing the safety aspects of civil aviation in India. It is responsible for regulation of air transport services to/from/within India and for enforcement of civil air regulations, air safety and airworthiness standards. It also interfaces with all the regulatory functions of International Civil Aviation Organization.

This Ministry deals with administrative control over allied and autonomous organizations such as Directorate General of Civil Aviation, Civil Aviation Security Bureau and Indira Gandhi National Flying Academy and related public sector undertakings, National Aviation Company of India Limited, Airports Authority of India and Pawan Hans Helicopter Limited. The Railway Safety Commission, which is liable for the security of operation under the provisions of Rail Travel and Railway Act, 1989, also falls under the administrative control of this Ministry.

Passenger Growth

Passengers carried by domestic airlines during Jan-Apr 2019 were 46.447 million as against 45.303 million during the corresponding period of previous year thereby registering a growth of 2.53%.

Table: Air Passenger Traffic in India, both

PASSENGER TRAFFIC	UNIT	2017-18	2016-17	2015-16	2014-15	2013-14
Domestic Passenger	Departing Passenger	123.32	103.75	85.2	70.08	60.67
	% age change over previous year	18.86%	21.77%	21.58%	15.51%	
International Passengers	Departing & Arriving Passengers	60.58	54.88	49.78	45.7	43.08
	% age change over previous year	10.79%	9.84%	8.85%	5.85%	
Total Passengers (Domestic & International)		183.9	158.43	134.98	115.82	103.75
		16.08%	17.37%	16.64%	11.63%	

Source: DGCA Handbook - Civil Aviation Statistics

As per estimates, a total of 138.976 passengers were carried by domestic airlines during Jan – Dec 2018.

Vision 2040

The Ministry of Civil Aviation released a report entitled "Vision 2040" on 15 January 2019 outlining a roadmap for the future of civil aviation in India. The report projects that air passenger traffic will increase six-fold to 1.1 billion by 2040 including 821 million domestic and 303 million international passengers. The report estimates that a total of 2,359 aircraft would be required to server passengers in March 2040.

The Ministry projected that the number of airports in India would rise from 101 in January 2019 to around 190-200 by March 2040 and an estimated 150,000 acres of land and US$ 40-50 billion of capital would be required for construction. The government proposed creating a $2 billion fund to help support low-traffic airports. The report also targets establishing an aircraft manufacturing base in India by 2040.

Revenue Passenger Kilometres (RPK) and Available Seat Kilometres (ASK)

Air Passenger						
PASSENGER TRAFFIC	UNIT	2017-18	2016-17	2015-16	2014-15	2013-14
Domestic Airline Demand	Revenue Passenger Kilometres (RPK)	117040	98640	80960	67020	59140
	% age change over previous year	18.65%	21.82%	20.80%	13.32%	
Domestic Airline Capacity	Available Seat Kilometres (ASK)	134540	116940	97710	84810	80720
	% age change over previous year	15.05%	19.66%	15.21%	5.07%	

Source: DGCA Handbook - Civil Aviation Statistics

RPK is calculated as the sum of the product obtained by multiplying the number of revenue passengers carried on each flight stage by the corresponding stage distance.

ASK is calculated as the sum of products obtained by multiplying the total number of seats that are available in each flight stage by the corresponding stage distance.

Key Facts in the Aviation sector:

Aviation Sector: India's civil aviation is among the fastest growing aviation markets globally with FY 18 recording 20% YOY growth.

Infrastructure: ₹ 16000 crore investments made on airport infrastructure from FY14-18; investments exceeding ₹ 1 lakh crore planned in next five years

Passenger traffic: Third largest aviation market by domestic air passenger traffic which stood at over 12.3 crore in FY 18 registering a growth of 19% CAGR from FY14

Airports: a total of 75 airports opened in 75 years of civil aviation in India while in 16 months of UDAN, 36 airports and 31 heliports awarded

Airlines: Distance flown by Scheduled operators rose to 19941 crore Km (FY18) from 11404 crore km (FY14), recording 15% CAGR growth

Fleet Strength: 587 aircrafts of scheduled Indian carriers operating year around; private scheduled airlines planned to add over 900 aircrafts in 9 years

Non-Scheduled operators (NSOP): Undergoing strong revival, domestic non-scheduled passengers grew to 14 Lakh (FY18) registering a 6% growth

Commitment to greener airports: Comprehensive regulatory policies and strategies adapted to reduce aviation carbon footprints

High quality job creation: Two lakh people are directly employed in various segments across aviation industry with substantial growth ahead

Ensuring hassle-free travel: Incorporated systematic approaches to redress passenger grievances and improve operational efficiencies across the system

Region-wise – Key Facts:

Region	Passenger Traffic growth (CAGR)	Air Traffic Movement (CAGR)
Northern Region	18%	16%
Western Region	14%	9%
Southern Region	17%	13%
Eastern Region	25%	16%

Source: Ministry of Civil Aviation

Affordable flying for all – India continues to have among the lowest airfares in the world and with the airport network growing rapidly, flying has truly become available for all.

UDAN – Ude Desh ka Aam Nagrik

Regional Connectivity Scheme to extend flight connection to Tier 3 and Tier 4 towns. Over 30 unserved and underserved airports added through UDAN, transforming connectivity in these communities, over 40 lakh seat capacity created for UDAN flights. Maximum airfare for 50% of seats on UDAN flights capped ₹2,500 for one hour of flying. ₹4,500 crore earmarked for revival and upgradation of UDAN airports, corpus of ₹300 crore raised to subsidise UDAN flights.

UDAN scheme has sparked massive increase in helicopter services in hilly areas and islands through use of 31 heliports. The UDAN scheme will now be extended to provide connectivity for underserved tourist destinations and international routes.

NABH Nirman

NABH (Next-gen airports for Bharat) Nirman programme formulated to prepare sector for a billion passenger trips. System capacity has been raised in all areas including airports, skilled staff, aircraft parking and maintenance, air traffic management, and financing. Close collaboration with states to ensure equitable land acquisition, integrated urban planning high speed transportation networks and balanced regional development. Regulations for greenfield and brownfield airports being revamped to attract necessary private sector investors. Over 1 lakh crore of investment lined up in airports in the next five years; AAI will invest over ₹ 20,000 crore.

Greenfield airports completed:

Durgapur, Shirdi, Pakyong, Kannur and Sindhudurg, 14 other greenfield airports being constructed: Mopa, Navi Mumbai, Shimogo, Kushinagar, Jewar, Dholera, Rajkot, Bhogapuram, Nellore, Orvakallu, Purandore, Bhiwadi, Singroli and Kathgodam

New terminals are being constructed at Delhi, Hyderabad, Bangalore, Lucknow, Leh, Chennai, Patna, Pune, Guwahati, Agartala, Trichy, Jaipur and many others

Skill development

Over 10 lakh high quality direct and indirect jobs have been created in the aviation sector and on-going growth will require skilled personnel in all areas namely Cabin crew, Engineering, Air traffic Control, Pilots, agents, design, and so on.

National Aviation Industry University operationalized with executive and management development programs already underway. Aviation Multi-skill Development Centre (AMSDC) has been launched in Chandigarh with Ministry of Skill development and Entrepreneurship; five more AMSDCs being operationalised. The number of Air Traffic Controllers increased by 505 to over 3,000 now.

Project DISHA

Largest Airport transformation efforts taken by AAI in 10 airports namely Chennai, Kolkata, Lucknow, Varanasi, Coimbatore, Bhubaneswar, Goa, Pune, Trivandrum, Guwahati constitute almost 60% of total AAI traffic. DISHA envisions enhancing non- aeronautical revenue through fixture of basic airport facilities and systematic capacity building in airport infrastructure through best in class business processes. Implementation of DISHA has led to operational efficiency including customer service and travel efficiency in these airports

NSOP placed for strong growth

The major NSOPs comprises of Pawan Hans (30.9%), Global Vectra (35.6%) and Himalayan Heli (17.9%) ruling 80% of the market in India. Over 3.5 lakh passengers carried by Scheduled Indian operators on non- scheduled operators in FY18, ~2% growth over FY14 Over 3.3 Lakh domestic NSOP flights operated in FY18 registering 2.6% CAGR growth over FY14. India's first dedicated Heliport launched at Rohini in Delhi in FY17. No prior ATC clearance required in airspace below 5000 feet for Helicopters and seaplanes



3.3 Ministry of Railways

The Indian Railways has contributed immensely to the growth of tourism in India and is among the world's fourth largest railway network. During 2017-18, the Indian Railways has carried 8,286 million passengers as against 8,116 million in 2016-17. The passenger break – up has been elaborated in the table below:

Table: Number of Passengers (in millions)

Year	Suburban (All Classes)	Upper Class	Mail / Express	Ordinary	Total	Total Non-Suburban	Grand Total
2015-16	4459	145	1321	2182	3503	3648	8107
2016-17	4566	150	1322	2078	3400	3550	8116
2017-18	4665	159	1390	2072	3462	3621	8286

Source: Railway Year Book 2017 – 18

As per 2017-18 estimates, the Indian Railways route length network is spread over 123,000 km taking into account (Broad Gauge + Metre Gauge + Narrow Gauge), with 13,452 passenger trains running each day from 7,318 stations which is elaborated in the table below.

Table: Number of Passenger trains running daily

Type of trains	Broad Gauge		Metre Gauge		Grand Total	
	2016-17	2017-18	2016-17	2017-18	2016-17	2017-18
EMU	5148	5507	0	0	5148	5507
Mail / Express	3524	3581	6	0	3530	3581
Passenger Trains	4387	4287	158	77	4651	4364
Total	13059	13375	164	77	13329	13452

Source: Railway Year Book 2017 – 18

Indian Railways' revenues increased at a CAGR of 6.20% during FY 07 – FY 18 to US$ 27.71 billion in FY18. The earnings from the passenger business grew at a CAGR of 6.43% during FY 07 – FY 18 to reach US$ 7.55 billion in 2017-18 P.

The Government of India has focused on investing on railway infrastructure by making investor-friendly policies. It has moved quickly to enable Foreign Direct Investment (FDI) in railways to improve infrastructure for freight and high-speed trains. The railway infrastructure investments are expected to increase from US$ 58.96 billion in 2013 – 17 RE (Revised Estimates) to US$ 124.13 billion in 2018 – 22 E (Estimated).

At present, several domestic and foreign companies are also looking to invest in Indian rail projects. Foreign Direct Investment (FDI) inflows into Railways Related Components from April 2000 to December 2018 stood at US$ 940.92 million.

Passenger Revenue:

Passenger earnings in 2017-18 were ₹ 48,643.14 crore. This was ₹ 2,362.68 crore (5.11 %) higher than the earnings in 2016-17. Suburban traffic contributed 5.76 % to the total earnings. The remaining 94.24 % came from non-suburban passengers. Earnings from Second and Sleeper Class Mail/Express passengers comprised 49.99 % of the total passenger earnings.

Budget Allocation:

The Centre has set the overall capital expenditure programme for Indian Railways at Rs 1.58 lakh crore, the highest ever for the national transporter. The capital support from the Budget for Railways is proposed at Rs 64,587 crore in 2019-20 (Budget estimate) from Rs 53,060 crore in 2018-19. The overall capital expenditure programme for Railways is of Rs 1,58,658 crore. The Railway Budget 2018-19 had set a capital expenditure for the Ministry of Railways at Rs 1.48 lakh crore.

Indian Railways has also focused on digital initiatives for bringing transparency and accountability to its business practices. E- reverse auction policy has been issued. 100% e- Procurement is being done through a single web-portal. Simpler approval processes in Research Designs and Standards Organisation have reduced process time from 30 months to 6 months.

Initiatives:

I. Upgradation of coaches including toilets in identified rakes of existing trains under Project Swarn and Project Utkrisht, and the introduction of improved passenger services such as Humsafar trains and Antodaya trains.

II. The provision of dustbins is being done in non-AC coaches also in addition to the AC Coaches.

III. The provision of health faucets in all new AC and non-AC coaches, in addition to mug with chain arrangement.

IV. The pace of installation of Bio-toilets in Coaches has been intensified. Railways plans to install bio-toilets in the entire BG coaching fleet by 2019.

V. Cleaning of coaches, including toilets, is done at both ends including mechanised cleaning through professional agencies at around 145 coaching depots.

VI. On Board Housekeeping Service (OBHS) has been provided in more than 1,050 pairs of trains including Rajdhani, Shatabdi and other important long-distance mail/express trains for cleaning of coach toilets, doorways, aisles and passenger compartments during the run of the trains.

VII. 'Coach Mitra' facility has been introduced in about 1,000 pairs of OBHS trains. 'Coach Mitra' is a single window interface to register coach related requirements of passengers such as cleaning, disinfection, linen, train lighting, air conditioning and watering of coaches.

VIII. Mechanized laundries have been set up at 57 locations in the railways to improve the quality of washing of bed linen.

IX. Pest control treatment of coaches and rodent control measures are regularly done as per schedule.

Infrastructural Development

Laying the foundations of infrastructure for a New India, there has been a quantum leap in capital expenditure. Total capital expenditure between 2014-19 is Rs. 5.1 lakh crore which is more than double of total expenditure during 2009-14.

Capacity Augmentation through Dedicated Freight Corridors (DFCs):

Successful trial of freight train over Phulera- Atari section of Western Dedicated Freight Corridor & Khurja - Bhadan section of Eastern Dedicated Freight Corridor (EDFC) in August & November 2018 respectively. The trials of Freight trains will be completed on extended sections of Rewari – Madar section of Western Dedicated Freight Corridor (WDFC) & Khurja – Bhaupur section of Eastern Dedicated Freight Corridor by the end of the financial year. The Dedicated Freight Corridor will be fully commissioned in phases by March 2020.

Station makeover with digital initiatives

Railways is improving passenger services including a complete makeover of Stations by installing modern facilities including escalators, lifts, free Wi-Fi etc. and using local art in the design. 4 stations are undergoing redevelopment, namely, Habibganj, Gandhinagar, Charbagh and Gomtinagar. The beautification of 65 stations has been completed using local art.

Connectivity to State Capitals:

As per Indian Railways' vision for North East region, all eight North East state capitals are to be linked with broad gauge rail link by 2020-21. Previously, only Guwahati had broad gauge railway linkage. Further, Arunachal Pradesh & Tripura State capital has been connected.

Marvels of Railway Engineering; Jiribam – Tupul - Imphal New line Project:

India's tallest bridge with pier height of 141 m is being constructed on Irang River at Noney in Tamenglong district, Manipur as part of the Jiribam-Tupul-Imphal new line project. Its height will be almost equal to two Qutub Minars combined.

There will be six tall bridges having pier height more than 70m in the Bhairabi-Sairang new line Project (51.3 km).

Metro Projects

Recognised as world's first and only 100 per cent 'green' metro system, the Delhi Metro has been instrumental in ushering in a new era in the sphere of mass urban transportation in India. The Delhi Metro has an operational network spanning 373 km comprising 271 stations with a daily ridership of around 2.7 million.

The swanky and modern Metro system introduced comfortable, air conditioned and eco-friendly services and completely revolutionized the mass transportation scenario not only in the National Capital Region but the entire country. The Delhi Metro Rail Corporation (DMRC) has been instrumental in completing the mammoth technically complex infrastructure project before time and within the budgeted cost parameters.

The Hyderabad Metro Rail Project is the world's largest Public Private Partnership Project (PPP) in the metro sector. The metro network will cover a total distance of around 72 Km across three corridors, transporting Hyderabad to the future. The Hyderabad Metro Rail has an average ridership greater than 2.3 million per day as on 2019.

National High-Speed Rail Corporation Limited

(A Joint Venture of Government of India and Participating State Governments for Implementing High Speed Rail Projects)

NHSRCL is implementing the high-speed train corridor (popularly called the bullet trains) between Ahmedabad and Mumbai. The total length of proposed High-Speed Railway Corridor works out to be 508.17 km and it will be passing through the states of Maharashtra and Gujarat and the Union Territory of Dadra and Nagar Haveli. The proposed corridor lies in the Western Railway and this will commence from Bandra Kurla Complex in Mumbai and will end near Sabarmati Railway Station in Ahmedabad. The project will also enable creation of around 15 lakh jobs. The cost of will go down further as the technology will grow massively and it will be developed under "Make in India" programme. It shall also benefit the farmers for transportation of agricultural produce in a fast mode.



4 | State Government Initiatives Towards Tourism Infrastructure

In order to augment the existing infrastructure for promoting tourism industry, most of the state governments have released New Tourism Policy highlighting various schemes for the development of destination and improving infrastructure thereby; and financial incentives to attract private sector investors to invest in both in greenfield and brownfield projects for the overall tourism infrastructure development of the state. Different government's initiative towards development of tourism infrastructure is described below;

4.1 Odisha

Odisha was known as "Utkala" during the ancient and medieval times. The name itself means – the land of excellence in art and craft. The art forms are visual manifestations of a rich cultural heritage of Odisha and reflect on a tradition which still lives in the creative imagination and skill of her craftsmen.

Odisha Tourism Development Corporation (OTDC) is a Government of Odisha undertaking operating the largest chain of hotel popularly known as "Panthanivas" in the state of Odisha. It provides one stop travel solutions to the tourists visiting the state. It is operating 20 hotels strategically located, well maintained and are moderately priced. OTDC operates sightseeing tours from all important Panthanivases on regular basis to nearest tourist locations.

The Department of Tourism is the nodal agency that formulates plans and policies for the development of tourism in the state. In the process, the department consults and collaborates with other state holders in the sector including line representatives and trade representatives for balanced development of tourism.

Tourist Circuits:

- GOLDEN TRIANGLE TOUR: Bhubaneswar - Konark - Puri - Satapada (Chilika) – Largest brackish water lake in Asia
- DREAM DESTINATION CHILIKA TOUR: Bhubaneswar - Konark - Puri - Satapada (Chilika) - Barkul (Chilika)
- BEST OF WILDLIFE & BUDDHIST TOUR: Bhitarakanika National Park - Lalitagiri - Udayagiri - Ratnagiri (Buddhist Circuit - Diamond Triangle)
- NATURE TOUR - 1: Barkul (Chilika) - Gopalpur - Taptapani - Rambha (Chilika) - Bhubaneswar
- NATURE TOUR - 2: Chandipur - Lulung - Similipal National Park - Talsari - Chandaneswar - Digha - Bhubaneswar
- EXCLUSIVE BHITARAKANIKA NATIONAL PARK TOUR: Bhitarakanika National Park (Crocodiles, Spotted deer, Mangrove Forest & Dangmal)

Key Initiative

- During 2017 – 18, an outlay of Rs 15,303 Lakhs was provisioned. Many promotional activities have been executed like in-flight magazine advertisements & outdoor branding undertaken at different travel journals and other places.
- A Memorandum of Agreement (MoA) between Government of Odisha and M/s Air Asia Berhad for operation of direct international air connection with Kaula Lampur, Malaysia and Odisha. Since, April 2017 this has opened new floodgates to South East Asian countries. On a similar note, Air India started international connectivity between Bangkok, Thailand and Bhubaneshwar in December 2017.
- Six tourism units have been leased out in PPP mode during 2017 – 18. The State Government has sanctioned funds for installation of Floating Musical Fountain and Video Projection Show at Narendra Pokhari and Kusum Tank in Jajpur. The laser show has already started in Puri, since, May 2017. Funds have been sanctioned for installation of Light & Sound show at Samaleshwari temple, Sambalpur.
- Around 100 nos. of Life Guards have been deployed along the Puri sea beach by the Home Department for tourist safety and prevent drowning deaths. These life guards of "Nolia" community have been imparted rescue and life-saving training and hospitality training by Tourism department. For better identification of these life guards, they have been provided with dress of international code, i.e. yellow and red colour T – shirts.
- 22 numbers of signage in three languages, namely, Odia, Hindi and English have been installed at Puri sea beach for creating awareness for safe sea bath for tourists. Warnings have been spelt out through these signage requesting tourist not to venture into the sea with intoxication condition.
- Police patrolling vehicles have been introduced in Puri – Konark and Puri – Satapada routes.

- Tourist Emergency Fund amounting to a crore has been created to provide financial assistance to tourists during disaster situations. Another one crore has been earmarked for beach cleaning activities pertaining to Puri sea beach.
- Single Window Clearance system adopted for approval of tourism related projects. During the year 2017 – 18, some 108 travel agents were recognized as "Excursion Agent".

4.2 West Bengal

West Bengal shares its border with 5 Indian states namely, Jharkhand, Bihar, Odisha, Sikkim and Assam and 3 countries, namely Bangladesh, Bhutan and Nepal. Be it the refreshing tea gardens of Darjeeling or the splashing sea waves in Bay of Bengal (the largest bay in the world), West Bengal is pouring with engaging tourist attractions throughout.

The state of West Bengal has been much embellished with striking architecture like the Metropolitan Building, General Post Office, St. Paul's Cathedral and off course, Victoria Memorial. Matching the footsteps with thriving modernization, there is no wonder that West Bengal has preserved its brilliant past as well. Mountains, coastal areas or plains; travellers have wider options to choose something that best matches their style.

Important Tourist Circuits and Destinations

The Tourism Policy 2016 has identified the six existing primary tourist circuits as under:

Darjeeling Himalayas: Kurseong, Kalimpong, Lava Lolegaon, Mirik, Sandakphu, etc.

Forests: Dooars, Jaldapara, Gorumara, Sundarbans

Bengal Heritage: Bishnupur, Murshidabad, Purulia, Malda, Birbhum, Hooghly, Burdwan, West Midnapore, Cooch Behar, etc.

Beaches: Digha, Shankarpur, Mandarmoni, Bakkhali, Gangasagar, Tajpur, etc

Religious: Gangasagar, Belur Math, Dakshineswar, Kalighat, Tarapith, Nadia, Bolla Kali Temple, Nakhoda Masjid, Furfura Sharif, Imambara, St. Paul's Cathedral, St. James' Church, etc.

Cultural: Shantiniketan, Kolkata, etc

Coastal Circuit (Under Swadesh Darshan Scheme): Udaypur-Digha-Shankarpur-Tajpur-Mandarmani-Bakkhali-Henry Island-Frazerganj is the upcoming Coastal Circuit (Under Swadesh Darshan Scheme)

West Bengal reflects the rich cultural heritage and traditional legacy through important destinations like Shantiniketan, Sunderbans, Darjeeling, Purulia, Bihnupur, Nabadwip, Chandannagar and also Kolkata which is the capital of the State.

Folk music and dances like Baul, Kirtan and Chau Dance are famous around the world. There are variety of tribes found in every nook and corners of the State. Bauls, Santhal, Paharia, Lephcas, Bhutiyas, Chero, Khariya, Garo and Lohara are amongst the popular tribes of West Bengal.

Strategies - Capturing the Fair Share:

- Tourist Arrival: To achieve a growth rate in excess of 10% year to year over the next 5 years
- Investment: To increase the availability of branded hotel accommodation room in the State to 10000 by 2020.
- Identification of new tourist destinations: New destinations are to be identified with backward and forward linkages and develop these into proper tourism products
- Marketing: Greater emphasis on branding of West Bengal tourism with the new logo and repositioning it effectively in the domestic and international market through a 360 degrees promotional campaign

Lead in Sustainable Development:

- Economic Sustainability: Various strategies will be adopted for optimal use of existing resources to achieve a responsible and beneficial balance in the long term
- Environment Sustainability: Emphasis will be on conservation and management of natural resources
- Social Sustainability: Tourism will be developed through community engagement, generation of local livelihood options and by increasing the quality of employment. Social sustainability is reflected in safety and standards to be maintained around the tourism destinations.

Proposed Infrastructure Project Investments

- Development of Jangal Mahal Tourism Circuit in PPP mode (Nearby Tourist Destinations: Jhargram Palace, Deer Park, Rabindra Park, Chilkigarh Raj Palace, Kanark Durga Temple, Dulung River, Alampur, Kendua, Mukutmanipur)
- Development of Amusement Park in 18 acres land at Digha through DBFOT basis with a proposed investment of around 40 crores (nearby tourist destinations include Shankarpur and Mandarboni)
- Construction of Marine Aquarium / Arrangement of Dolphin Show in PPP mode to be set up in 3.5 Acres of land at Digha with a proposed investment of around 20 crores
- Development of Convention Hall and allied facilities in PPP mode under MICE Tourism on NH 31 around 10 km from Siliguri and 4 km from Bagdogra in 3 acres of land (Nearby Tourist Destinations: Siliguri, Dabgram, Kurseong, Mirik)
- Construction of Shopping Mall in Digha requiring 10 acres of land in PPP mode with a proposed investment of 20 crores for the promotion of local handicrafts in line with Chokhi Dhani, Rajasthan
- Mega Eco Tourism Hub at Gajoldoba requiring 208 acres of land with a proposed investment of 1500 crores. This is a long-term project and is being structured as an Integrated Multi-Product Mega Tourism Park situated in Dooars in North Bengal.

The project will consist of development of Eco Resort, Hospitality Training Institute, Amusement Park and Golf Course amongst others. Tourism Department has so far spent over INR 100 Cr for basic infrastructure development like road connectivity, power, water supply, inner arterial roads, street lighting amongst others (Location: Mal Block, Jalpaiguri District, besides Teesta Barrage).

- Jharkhali Eco Tourism Hub would have high end resorts, budget hotels, cottages, lake, club house, among others. Located at Basanti Block, South 24 Parganas, this is a long-term project to be implemented in 43 acres of land with a proposed investment of 400 crore. The Tourism Department has already invested over INR 25 Cr for basic infrastructure development like road connectivity, power, water supply, construction of jetties amongst others.

- River Tourism project envisages operation of Water Taxi / House Boat / Floating Restaurant; Daily cruise in Kolkata and short cruises up and down the Ganges / Sundarbans; already Vivada Cruise and Heritage River Journeys have been successfully operating cruises in the State.

- Development of Passenger Ropeway in DBFMO basis with a proposed investment of 10 crore (approx) from Kurseong to Mirik, Mukutmanipur across the dam, Ajodhya Hill. The West Bengal Tourism Development Corporation in consultation with the concerned District Administration will identify, possess and allow suitable land along the proposed alignment for constructing both the stations and the investor shall establish and operate the said passenger ropeway as per detail layout plan at the location after commissioning of the ropeway.

- Hop on, Hop off Bus Services at Kolkata covering city tour destinations like Victoria Memorial, Indian Museum, Science City, Howrah Bridge, Marble Palace, Prinsep Ghat, Kolkata Trams, Writers' Building, Jorasanko Thakur Bari, Shaheed Minar, etc.

- Fast Food Restaurant proposed on contract basis at Digha, Shantiniketan, Bishnupur, Siliguri, Baharampore, Barrackpore, Diamond Harbour. The State will facilitate and provide space at tourist lodges (TL) maintained by West Bengal Tourism Development Corporation (Digha TL, Shantiniketan TL, BishnupurTL, Mainak TL, Beharampur TL, Malancha TL, Sagarika TL).

- Development of Way Side Amenities at Science City – Godkhali Route (Gateway to the Sundarbans). The project envisages providing wayside amenities such as quality rest, food & amenities to tourists travelling by road along the Science City Godkhali Route in coordination with Tourism Department and PWD Department, Govt. of West Bengal. (Nearby Tourist Attractions: Sunderbans National Park, Sajnekhali Bird Sanctuary, Bhagatpur Crocodile Project, Dublar Char Island, Piyali, Netidhopani, Halliday Island)

4.3 Madhya Pradesh

Madhya Pradesh can be described as the best state of the nation when it comes to the diversity of its tourism destinations. Madhya Pradesh is known as the "Heart of India' not only because of its location on the map, but also as a home to cultural and spiritual heritage of almost all the religions. It has been home to the cultural heritage of Hinduism, Buddhism, Jainism, etc.

Innumerable monuments, intricately carved temples, stupas, forts and palaces are dotted all over the State. The state is home to three UNESCO World Heritage Sites namely Sanchi, Bhimbetka and Khajuraho. Madhya Pradesh has won Best Tourism State National award for 3 consecutive years i.e. 2017, 2016 and 2015.

Tourist Destinations in Madhya Pradesh

The state has 382 tourist sites, including world heritage sites. Major places of tourist interest in Madhya Pradesh are as follows:

Architecturally significant or scenic sites	Pilgrimage	National Parks	Nature Reserves	Hill stations
Amarkantak, Bhopal, Mandu, Orchha, Burhanpur, Alampur, Asirgarh, Bawangaja, Chanderi, Chitrakoot, Deorkothar, Dhar, Gwalior, Indore, Jabalpur, Maheshwar, Mandleshwar, Padhawali, Mitawali, Bateshwar, Muktagiri, Omkareshwar, Shivpuri, Sonagiri, Ujjain, Khajuraho	Ujjain, Omkareshwar, Maheshwar, Amarkantak, Maihar, Chitrakoot, Burhanpur, Orchha.	Kanha National Park, Bandhavgarh National Park, Satpura National Park, Sanjay National Park, Madhav National Park, Mandla Plant Fossils National Park, Panna National Park, Pench National Park, Van Vihar National Park.	Pachmarhi, Amarkantak, Bagh Caves, Bhedaghat Bori Wildlife Sanctuary, Kuno-Palpur Wildlife Sanctuary, Narwar Chambal, Narsinghgarh Patalkot (Tamia)	Panchmarhi Amarkantak

Major Tourist circuits in Madhya Pradesh:

The major popular tourists circuits including all flavours of Madhya Pradesh are as follows:

- Gwalior – Shivpuri – Orchha – Khajuraho: Architectural grandeur and rich history of Madhya Pradesh
- Indore – Ujjain – Maheshwar – Omkareshware – Mandu: Spiritual sojourn in Madhya Pradesh (Temple towns)
- Jabalpur – Bhedaghat – Mandla – Kanha – Bandhavgarh: Close to nature with majestic waterfalls and Wild santuaries
- Sanchi – Bhopal – Bhojpur – Bhimbetka – Pachmarhi: A perfect blend of history and nature

Major initiatives in the tourism sector

- An Investment Promotion Division is setup in MP Tourism Board.
- Allotment of Land Parcels, WSAs and Heritage Properties to private investors through e – tendering process.

- Focus on Water Tourism, Camping/Adventure Tourism and Film Tourism, Rural Tourism.
- Registration and Stamp Duty exemption for Govt. lands/ properties on lease.
- To set up 300 Way Side Amenities on National and State Highways through private investment, in coming 3 years.
- Continuous updating of tourism policies according to the need and Investors' feedback.
- Bringing Bread and Breakfast stay, Gram stay and Farm stay policies to create experiential tourism destinations throughout the State.

Tourism Policy of Madhya Pradesh

- **Capital Subsidy to tourism projects**

Capital subsidy is provided to set up the following tourism projects anywhere in the State:

Subsidy Scheme	% of Subsidy against Fixed Capital Investment	Maximum ceiling of Subsidy
All tourism projects*	15 % on capital Investment	From INR 0.2 to 10 crore
Creation of basic Infrastructure Road, Power, Water supply, Drainage and Sewage etc. on govt. allotted land	25% on capital Investment	INR 3 crore.
Rope Ways	40% on capital Investment	INR 5 crore.

**Includes the following projects:*

Hotels - Deluxe/Standard	Amusement Parks
Health Farm/Resorts	Water Park & Water Sports
Heritage Hotels	Film studios / Film Making Infrastructure
Wellness Resorts	Cruise & House Boats
Camping Site & Tenting units	Golf Courses
Convention Centres	Adventure Sports
Museum / Aquarium / Theme Parks	Wayside Amenities
Rope Ways & Basic Infrastructure*	Sea Plane
Light & Sound / Laser shows	Amphibian Tourist Vehicle
Aero Sports and Aero sports Training centre / Academy	

Exemption from Registration and Stamp Duty Fees:

- The registration & stamp duty shall be reimbursed to all new Heritage Hotel projects.
- Government land given on lease for Tourism Projects is exempted from paying stamp duty & registration charges.

Facilities to Tourism similar to Industries:

- Tourism Projects shall be allotted land in Industrial areas/Industrial Parks/Industrial city/IT Parks on industrial rates.
- Diversion fees, Water allocation from natural resources, Property tax/development charges as per industrial rate.

Land Allotment Policy

- Govt. land transferred to Tourism Department
- Total Station Survey and Seemankan is done by MPTB
- Suitability of land for specific purpose is defined
- Necessary infrastructure is created as per need
- Allotment to private investors through online bid process
- Leased out for 90 years, permission to mortgage for loan
- Fixed reserve price , Rural area – 5 lakh/Hect, Urban area – 10 lakh/Hect
- Fixed time line to setup project

Heritage Property Allotment Policy

- Suitable old government buildings, Dak bungalows and state notified heritage properties at potential locations are identified by an Empowered Committee (EC) headed by CS.
- De-notification of select state properties is done and transferred to Tourism Department
- Detailed study (architectural mapping) of the selected properties, regarding conservable, repairable and replaceable structures, is done through School of Planning & Architecture
- Property is placed on bid for allotment, Reserve price INR 01 lakh
- Property allotted to highest bidder for 90 years lease and lease rent 1 % P.A.
- Approval of the conservation and development of Heritage Hotel plan according to SPA findings by the expert committee
- Investor has to commence the project in 4 years.

Eco & Camping/ Adventure Tourism:

- Tourism activities shall be carried out in the notified area of States Forest area under "Madhya Pradesh Forest (Entertainment and Wild life experience) Rule 2015.
- Activities such as Camping, Trekking, Angling, Water Sport, Elephant Safari, Cycle Safari, Riding trail, Photo safari, Canoeing Safari, White Water rafting, Rock climbing/ Mountaineering, Para-Sailing/Para gliding, Hot air ballooning etc.
- Tourism Department can offer land on lease or license.

Film Tourism:

- Tourism department shall co-ordinate with departments to obtain the legal mandatory permissions needed for producers on best effort basis.

- 40% discount on lodging at MPSTDC properties in off peak – season
- Upto INR 50 mn capital subsidy on establishing film studio/creating infrastructure for film making

Water Tourism:

- 22 water bodies of approx. 3,000 sq. km. area notified for water sports .
- MP Tourism Board is made Nodal Agency to grant permits and licences .
- Land available in these water areas as river banks or an island shall be transferred to Tourism Department to allot to private investor.

Development of Wayside Amenities:

Wayside amenities shall be developed on National/State highway and other major roads at approximately every 40-50 km. distance in a planned manner through Brownfield, Greenfield & franchisee model.

Brown Field	Green Field	Franchise
• Fixed Reserve Price: INR 10 Lakh per hectare for plug & play facility • Online bidding process • 30 Year Lease to Operate • Freedom to create support activities	• Fixed Reserve Price (Upto 2 hectare): INR 5 Lakh • Online Bidding Process • 30 Year Lease to Build and Operate • Freedom to create support activities	• Private facility can be registered • One time registration fee: INR 1 Lakh • Annual renewal fee: INR 25,000
• Common branding, logo, signage and operation manual • Free of cost training and skill Development of manpower		

Employment oriented Skill Development education & training for youth:

Youth shall be educated and trained in suitable trades for tourism industry, through State Institute of Hospitality Management (SIHM), Madhya Pradesh Institute of Hospitality Training (MPIHT) and Food Craft Institute (FCI) established by Tourism Department.

Special Efforts for Comprehensive Tourism Development:

- Marketing, Branding, Advertising of Tourism Products in national & international markets.
- Digital and social media platform shall be used for marketing, advertising & branding.
- Expertise and Excellence of successful entrepreneurs will be encouraged and utilized for tourism development in the state.
- Private transport operator shall be linked to Tourism areas and encouraged to provide quality transport services.
- For domestic and foreign tourist, pre-planned tourist package (Fix tours) shall be developed and marketed.
- Master plan for developed tourist area and areas potentially rich for tourism development.
- New entrepreneurs with intent to invest in tourism sector shall be given full support.
- To honor and encourage the excellence in tourism, "Madhya Pradesh State Tourism Awards" shall be given.

Note:- For detail information visit : www.tourism.mp.gov.in

4.4 Gujarat

Gujarat, the home state of Mahatma Gandhi, the Father of Nation is renowned for its beaches, temple towns and historic capital. Wildlife sanctuaries, hill resorts and natural grandeur are gifts of Gujarat. Sculpture, handicrafts, arts, festivals also make the state rich. Gujarat is also among the most technologically advanced, housing the largest petrochemical complex in the country.

Gujarat is a state with an amazingly varied topography ranging from the deep green of the dense forests to stark white at the salt plains. Its 1660-kilometre coastline is home to some of the most unique marine species and geographical locations at the state makes it an ideal matrix, a melting pot of a vast variety of culture, people, places and history due to eons of migratory influences. The state's major attractions include the only habitat of the Asiatic Lions in India (Gir Forests), a desert ride at the Wild Ass Sanctuary and the beautiful Indo-Saracenic Architecture of Ahmedabad.

Tourist inflow in Gujarat

Gujarat contributed to 2.93 % of domestic and 1.67% of foreign tourist share of India in 2017 ranking 9th and 13th respectively in the country with respect to other States. Both the domestic and foreign tourist flow in the state is exhibiting a high CAGR growth over the last 3 years growing @ 15.42% and @25.5% respectively.

Places to Visit in Gujarat

- **Archaeological & heritage tourism**- There are around 16 heritage sites promoted by The Gujarat tourism board including three World heritage sites like Lothal, Dholavira and Champaner. Heritage sites include architecture, Buddhist footprints, forts, gravesites, Havelis, and Palaces.
- **Beaches**- There are 22 beach destinations in Gujarat across the state promoted by the state tourism board. These are well connected by roads and railways with different parts of the state.
- **Religious Tourism**- Gujarat is home to more than 50 devotional centres and temples with famous religious centers like Dwarka, Dakor, Ambaji, Palitana, Mahudi, Shankheshwar, Palitana temples of Jainism, Junagadh Buddhist Cave Groups etc. and promotes religious tourism across the sites.
- **Wildlife tourism**- Gujarat is habitat for the world's rarest like Asiatic lions as well as large number of fauna and flora. Sanctuaries at Gir National Park, Marine National Park, Gulf of Kutch, Vansda National Park, Nalsarovar Bird Sanctuary, Kutch Bustard Sanctuary, Purna Wildlife Sanctuary and Blackbuck National Park, Velavadar are the major attractions.
- **Fairs & Festivals**- Gujarat celebrates unique festivals like "Navratri Garba" "Kite Festival "Kankaria Carnival" "Rann Utsav", "Modhera Dance Festival" and fairs like Tarnetar Fair & Vautha Mela which attract considerable tourists both from domestic and foreign destinations

- **Medical Tourism**- Ahmedabad, leading city of the state is the most preferred place for medical tour or medical treatments in India. More than 1500 foreigners visit the state per year for various treatments in the state. Ahmedabad Civil Hospital is the biggest hospital in Asia located at Ahmedabad.
- **Royal Orient Train**- An Indian luxury tourism train started in 1994-95 that runs between Gujarat and Rajasthan, covering important tourist locations in the two states. There are 13 coaches in the train, named after erstwhile kingdoms of Rajputana. The coaches provide five-star hotel comforts, multi-cuisine restaurants, a bar on board, a lounge etc. The Royal Orient offers a 7-day/8-night package that covers important heritage tourist locations in Rajasthan and Gujarat.

Infrastructure

Strategically located on the west coast of India, Gujarat is well connected to some of the major cities of the world by air and sea routes. It has one of the highest number of airports and airstrips numbering 17 in all- including an international airport at Ahmedabad.

Further it has over 5,000 km of rail network, about 77,000 km of motorable roads, 24 x 7 power supply and above all an enviable law-and-order situation. Characteristic of a buoyant economy, the State Domestic Product (SDP) growing at an average growth rate of nearly 10% since 2005, is higher than the national average.

Carrying forward the rich legacy of the immediate past, the State Government has embarked upon a flagship programme of Gatisheel Gujarat further fuelling all-round growth and development.

Tourism Policy

GUJTOP has been assisting tourism department of Gujarat in undertaking various activities including development of tourism infrastructure projects on Public Private Partnership format, assisting Government in Policy Development and many other initiatives as detailed out below:

Tourism infrastructure projects on PPP format

- Multiple Tourism Projects: GUJTOP has been mandated to undertake 50 tourism projects across Gujarat to be developed on PPP format. To enhance tourism infrastructure across the state, GUJTOP has identified potential sites that can be developed into:

    1. Beach Tourism & Water sport activities
    2. Religious tourism
    3. Business Tourism
    4. Tribal/Rural/Craft tourism
    5. Eco-tourism / Wild-life tourism
    6. Wayside Amenities

- Mega International Convention Centre at Vadodara
- Tourism Development at Kutch Mandvi
- Identification of Private land bank for tourism projects
- Infrastructure Gap assessment for selected tourism destinations in Gujarat
- Development of Adventure Sports/Water Sports and Aero sports across Gujarat
- Marine Conservation Research Institute (Oceanarium) at Jamnagar

Strategies adopted to promote tourism in Gujarat: Tourist-centric Approach

- Improving tourist safety and security at all tourist destinations through schemes like Tourist Wardens, 24 x 7 Centralized Helpline, etc;
- Improving the experience of young travellers by provision of crèches and play areas;
- Adopting a multilingual approach towards promotion through publicity material, collaterals, guide training, etc;
- Improving access for the differently-abled, the infirm and the aged through provision of ramps, escalators and other forms of assisted access to various tourist attractions;
- Developing the tourist circuits in a phased manner;
- Promoting experiential tourism by showcasing and promoting various fairs and festivals (indicative list appended at Annexure B), living traditions, local customs, cuisines, etc;
- Evolving a system of taking regular feedback from various stakeholders in general and a cross-section of the tourists in particular; and Strengthening of the Grievance-Redressal Mechanism.
- Thrust on Environment-Friendliness, Sanitation and Cleanliness
- Undertaking concerted activities under "Swachh Bharat" and "Swachh Gujarat";
- Adopting the "Sustainable Tourism Criteria for India" for the tour operators and hoteliers as laid down by the Ministry of Tourism (MoT), Government of India. Sensitization for stakeholders shall be undertaken by means of workshops, conferences, events, etc;
- Lending financial support to encourage green projects by tourism units through bio-toilets, pollution control measures, solid/liquid waste management, energy efficiency measures, etc; and
- Augmenting construction of public conveniences and maintaining cleanliness, preferably through public participation or on PPP mode.

Incentives:

The State Government grants the status of Industry to the Tourism Sector. The following incentives / concessions have been provided for under this Policy:

Capital Subsidy to the Eligible Tourism Units

(a) Quantum of Capital Investment subsidy:

Eligible Capital Investment	National Parks	Nature Reserves
Investment upto Rs.50 crore	15%	Rs. 7.50 crore
Investment above Rs. 50 crore	15%	Rs. 10 crore
Tented accommodation (with minimum investment of Rs.0.20 crore)	20%	Rs. 0.15 crore
Equipment worth Rs.1 crore and above for Adventure & Water Sports and Golf Equipment for Public Golf Courses registered with TCGL	10%	Rs.0.50 crore

(a) Additional Capital Subsidy of 5% will be provided to New Tourism Units coming up within the Corporation limits of Gandhinagar (State Capital), Yatra Dhams such as Ambaji, Dwarka, Dakor etc, Eco-tourism Centres of Gujarat including Nalsarovar, Polo, Dangs etc, new tourism Units owned and managed by women entrepreneurs , SC/ST categories and differently-abled.

Interest Subsidy to the Eligible Tourism Units

(a) Quantum of Interest Subsidy

(i) @5% of the Loan Amount with maximum amount of Rs.25 lakhs per annum for a period of five years in Municipal Corporation areas for eligible tourism units.

(ii) @7% of the Loan Amount with maximum amount of Rs.30 lakhs per annum for a period of five years in the areas other than mentioned above.

(iii) For Heritage Hotels @7% of the loan amount with maximum amount of Rs.30 lakhs per annum for a period of five years.

Registration / Stamp Duty Concession: 100% reimbursement of Stamp Duty and Registration Fee on sale/lease/transfer of land for the first transaction only

Exemption from Luxury Tax: The exemption will be applicable to Eligible Tourism Units for a period of five years from the date of commencement of commercial operations or the date of completion of expansion.

Exemption from Entertainment Tax: The exemption from Entertainment Tax will be applicable to Eligible Tourism Units for a period of five years from the date of commencement of commercial operations or the date of completion of expansion.

Exemption from Electricity Duty: There will be complete exemption from paying Electricity Duty for a period of five years from the date of commencement of commercial operations for New Tourism Units only.

Support for Sustainable Tourism: Assistance will be extended to eligible tourism units up to 75% of the cost of carrying out Energy Audit, Water Harvesting / Conservation and Environment-friendly practices like Green Buildings, Solar and other Renewable Energy measures, to a maximum token amount of Rs 50,000 per unit.

Special Package for Mega Tourism Units:

(a) 100% reimbursement of Stamp Duty and Registration Fee on sale/lease/transfer of land for the first transaction only during the operative period of this Policy.

(b) Capital Subsidy of 15% of Eligible Capital Investment (excluding the cost of the land) subject to a ceiling of Rs.20 crores.

(c) Exemption from Luxury and Entertainment tax for a period of seven years from the date of commencement of commercial operations.

(d) Exemption in Electricity Duty would be for a period of five years from the date of commencement of commercial operations.

Incentive for Promotion of Innovation: quantum assistance

Project cost	No. of person directly employed	Incentive amount
Rs.10-50Cr	50	Rs. 10 Lakh
Rs.1-10 Cr	30	Rs. 5 Lakh

Other incentives include:

- Support for Marketing and Promotion
- Assistance in Skill Development
- Incentives for ICT Enablement in tourism sector
- Assistance for Research in the Tourism / Hospitality Industry

4.5 Karnataka

Karnataka, the eighth largest state in India, is home to 507 of the 3600 centrally protected monuments in India, the largest number after Uttar Pradesh. Karnataka houses 319, the largest number of tourist destinations in the country. Rough Guides Magazine of England has reported stating that Karnataka is one among the Top 10 Valuable Tourist destinations in the World.

Tourism centres on the ancient sculptured temples, modern cities, the hill ranges, forests and beaches. Broadly, tourism in Karnataka can be divided into four geographical regions: North Karnataka, the Hill Stations, Coastal Karnataka and South Karnataka. The State Directorate of Archaeology and Museums protects an additional 752 monuments and another 25,000 monuments are yet to receive protection.

There has been a humongous growth in domestic tourists in the state of Karnataka over the last 3 years growing at a CAGR of 22.5%. The state has moved from 5th position in 2016 to rank third in the country as of 2017 there by emerging as one of the most sought-after tourist destinations in the country.

Places to visit in Karnataka

World Heritage centres

- Hampi, in Bellary District is the site of the capital of Vijayanagara (1336) and formerly the seat of the Vijayanagar Empire. Foreign visitors in the 15th and 16th centuries described Hampi as being bigger than Rome.
- Group of 8th-century CE monuments, Pattadakal located on the banks of the river Malaprabha, the second capital of the Chalukyas and contains examples of 7th and 8th century temple architecture.

Historical Locations

Historical locations in Karnataka include places in North Karnataka like Badami Chalukyas monuments located at Pattadakal, Aihole and Badami. Aihole has been called the cradle of Indian architecture and has over 125 temples and monuments built between 450 and 1100 BC.

Rashtrakuta monuments at Lokapura, Bilgi and Kuknur and Kalyani Chalukyas monuments built in Gadag style of architecture at Lakkundi, Gadag, Itagi (in Koppal District) and the Vijayanagar empire temples at Vijayanagara

Places of worship

Karnataka house several Jain Temples, Buddhist Temples, Shiva temples and Shakti Sthals across the Northern part of the state majorly spread across Badami, Gadag, Gulbarg and Bagalkot districts. There are around 20 pilgrimage centres in the state across districts.

Coastal Karnataka

Karnataka is blessed with over 300 km of pristine coastal stretch. Netrani Island of Uttara Kannada is known for coral reefs. Coastal Karnataka is the stronghold of Hindu and Jain pilgrimage spots with Udupi and its many temples being the centre of Dvaita philosophy. Gokarna is known for Vedic studies, Sringeri has the first of the Shankaracharya mathas and is important for its Advaita philosophy, Karkala and Mudabidri are well known places of Jain worship and Vaishnava rituals.

Eco Tourism

Karnataka eco-tourism consists of 21 wild life sanctuaries, around 24 hill stations, 11 botanical and rock gardens, innumerable waterfalls and 5 National parks. Bandipur National Park in Chamarajanagara District, Bannerghatta National Park in Bangalore district, Nagarhole National Park in Mysore District and Kodagu district, Kudremukh National Park in Dakshina Kannada and Chickmagalur district, are few of the distinct ones. Recently, the government of India has proposed to the UNESCO to include important ecosystems in the Western Ghats as a World Heritage Site. 15 golf courses, of which 11 are 18-hole courses, tee-off leisure and relaxation industry in the State.

Adventure Tourism

Adventure tourism is promoted in the places like Dandeli, Nandi Hills, Kumara Parvatha, Mulliyana Giri, Kalavara Durga, Shivaganga Hill Devarayanadurga , Kemmanagundi, Yana, Kabini, Sharavati, Bheemashwari in the state of Karnataka.



Golden Chariot

The Karnataka government has recently introduced The Golden Chariot – a train which connects popular tourist destinations in the state and Goa. The only luxury train in South India, "Golden Chariot" offers an insight into treasure trove of archaeological wealth, abundant bounty for wildlife seekers and a kaleidoscope of culture. Designed & operated on the lines of World-famous Palace on Wheels Train Tour. It is a Southern Splendour. It offers luxuriously furnished Air-Conditioned Saloons of 4 sleeping chambers (Cabins), Two Dining Cars, One Bar Lounge, Business Centre, Mini Gymnasium & Ayurvedic Spa.

Wellness Tourism

Karnataka has the highest number of approved health systems and alternative therapies in India. Karnataka has emerged as a hot spot for health care tourism. ISO certified government-owned hospitals, private institutions which provide international quality services. Bangalore is a mix of traditional systems like Ayurveda and yoga and modern medical expertise. In Bangalore there are a multitude of agencies responsible for the city's healthcare delivery system.

Support Infrastructure in Karnataka

However, it's the state's physical infrastructure that has bolstered both new and traditional sectors, such as heavy engineering, biotechnology, automobiles and aerospace. Innovations in road, air, marine and rail connectivity continue to propel Karnataka to new economic heights. The public-private partnership (PPP) model has been key to renovating basic and advanced infrastructure. As part of th

Road Infrastructure

Revamping road connectivity Road infrastructure is one of the main reasons for Karnataka's social and economic advancement. First-class transport connectivity is vital to maintaining Karnataka's reputation as an industrial and technology hub. The government has constructed almost 30,000 km of state and district highways to unite every corner of Karnataka.

In addition, the Karnataka State Highways Improvement Project (KSHIP) has entered the third phase of building and upgrading the core road network. KSHIP-III endeavours to build 418.5 km of roads at a cost of Rs 5,334.2 crore in 2017-18. More than Rs 115 crore has been earmarked for the Tender SURE (Specifications for Urban Roads Execution) project in Bengaluru.

Aviation

Karnataka produces more than a quarter of India's aircrafts and spacecrafts, as well as being home to Airbus and Boeing research and engineering centres.

Kempegowda International Airport in Bengaluru is now India's third largest in terms of passenger activity. A second terminal and runway, to ease congestion and reduce waiting times, will be completed by September 2019, allowing the airport to accommodate around 35 million passengers annually.

As an emerging hub for domestic and international travel, Mangaluru International Airport has outgrown its current space. To address this, the government has submitted a land acquisition proposal to expand its second-busiest airport by 286 acres.

A new and improved Belagavi airport, with a capacity of more than 300 passengers, was unveiled in September 2017, at a cost of Rs 120 crore. Also, on the cards are proposed airstrips in Karawar, Madikeri and Chikkamagaluru.

Railways

In the last four years, the government has spent Rs 1,637 crore constructing rail links over and under bridges to reduce traffic congestion and reduce the burden on roads. Land is currently being acquired for a 156 km long Gadaga-Vadi line, to which the government will contribute 50% of the total project cost of Rs 1,922 crore. The state has also allocated 958 acres of land to upgrade railway lines to Hubbali and Belagavi airports.

Tourism Infrastructure initiatives by Karnataka state Government

- Karnataka Infrastructure Development Corporation has taken initiatives to improve tourism infrastructure in sectors like Amusement/ Entertainment / Theme Parks, Hotels/ Resorts, Convention/Exhibition Centres, Trade Fair and Cultural Centres etc..
- Proposals to establish cable cars at Nandi Hills, Madhugiri, Chamundi Hills, and Kemmannugundi Hills
- Key projects under development with PPP model includes Bangalore international Airport
- Identification of 46 destinations under project called Adoption of Tourist destinations
- Allowing cruise tourism at various ports like Belekeri Port, Malpe Port, Karwar Port, Tadri Port, and new and old Mangalore Ports
- Empanelment of Rating Agencies to assess the service providers in the Tourism industry

Karnataka tourism Policy

Karnataka Tourism Policy 2015-2020 includes a plentiful of generous concessions and subsidies for eligible entities willing to develop tourism projects in the state. The tourism policy looks towards a steady growth by attracting private investors to develop tourism destinations in the state, thus replicating a similar trend witnessed across states like Gujarat and neighbouring state of Maharashtra. The Policy has given impetus to develop tourism infrastructure through the Public-Private-Partnership (PPP) Model.

- The policy defines geographical regions are Focus Tourism Destinations (FTD), Hyderabad Karnataka Region (HKR) and regions of the state categorized into not backward, backward, more backward and most backward places. FTDs are 40 places identified across the state for tourism development under urban tourism, heritage tourism, nature tourism (Western Ghats), wildlife tourism, wellness tourism, religious tourism and coastal tourism, while Afzalpur, Aland, Chincholi, Chittapura, Kalaburgi, Jevargi and Sedam of Kalaburgi district and Shahpura, Surpura and Yadgir of Yadgir district constitute the HKR.
- The policy offers 100 percent exemption on stamp duty and 100 percent reimbursement of land conversion fee for developing tourism projects in FTDs, HKR, most backward and more backward regions.

- Investments in tourism projects have been categorized into mega projects for projects valued between Rs.100 crore and Rs.500 crore, ultra-mega projects for projects valued between Rs.500 crore and Rs.1,000 crore and super mega projects for projects valued above Rs.1,000 crore. Mega projects are eligible for 100 percent entry tax exemption on plant and machinery and capital goods for a period of five years from the date of commencement of project implementation. Entertainment parks classified as ultra-mega projects and super mega projects are eligible for reimbursement of entertainment tax for the first five years.
- Tour operators and tourism project proponents in Karnataka will be exempt from paying motor vehicle tax for a maximum of five vehicles bought for tourism-related activities.

4.6 Delhi

A symbol of the country's rich past and thriving present, Delhi is a city where ancient and modern blend seamlessly together. A cosmopolitan metro, the city has much to celebrate as it has already reached the milestone of completing 100 years as a Capital. Delhi showcases an ancient culture and a rapidly modernising country. The seat of many powerful empires in the past, its long history can be traced in its many carefully-preserved monuments, ancient forts and tombs.

The presence of 3 UNESCO World Heritage Sites – Humayun's Tomb, Qutub Minar and Red Fort complex has enabled Delhi to witness an equally growing market in tourism for both domestic and foreign tourists growing at a CAGR of 7.36% and 7.33% respectively. Delhi contributes to more foreign tourists in the country with a percentage share of 10.2% in 2017 than domestic tourists in the city. It ranks 4th in the foreign tourists' arrival and 15th in domestic tourist flow within Indian states.

Tourist places in Delhi

There are around 25 tourist spots in Delhi showcasing India's ancient art, culture, and architecture Monuments, Forts, Cultural corners and Memorials. Major tourist spots can be enumerated as:

Memorials, museums and temples	Cultural tourism	Historical tourism
Akshardham Temple, Lotus Temple, Azad Hind Gram, Birla Mandir, Garden of Five Senses, Iskcon Temple, Kalam memorial, Gurudawra Bangla Sahib, Guru Tegh Bahadur Memorial	Dilli Haat, Dilli Haat INA, Dilli Haat Pitampura, Dilli Haat Janakpuri	Humayun's Tomb, India Gate, Jama Masjid, Jantar Mantar, Lodi Tomb, Parliament House, Purana Quila, Qutab Minar, Rashtrapathi Bhavan, Safdarjang Tomb

Delhi is also gaining recognition as a cultural destination. Delhi Tourism's major festivals—namely, the International Kite Festival, Magic Festival, Itra and Sugandhi Mela, Mango Festival, Dilli ke Pakwaan, and Garden Tourism Festival are becoming an integral part of Delhi's cultural heritage.

Accommodation

Delhi is one of the India's busiest cities and has more than 4800 hotels. It has a wide range of accommodation available from deluxe five-star luxury hotels, with top-notch restaurants, 24-hour coffee shops, swimming pools, travel agents and shopping arcades, to middle-range hotels and guest houses offering good services and a comfortable stay, down to economical tourist lodges. There are a few Tourist Hostels, working women's Hostels, Service Apartments, Camping Sites and Dharmashalas as well.

Transport Infrastructure

Delhi has a modern, well-planned and extensive Metro network that connects all corners of Delhi; this network is still growing. New roadways and fly overs have improved connectivity, the latest of which is the Signature Bridge, an ambitious project of Delhi Tourism, which is under construction at Wazirabad – it promises to be a landmark.

Hop on- Hop off buses, better known as HO – HOs, have been introduced by Delhi Tourism for visitors who wish to tour the city in a single day which connects all of Delhi's landmarks to the city centre as well as most suburbs.

The revamped Indira Gandhi International airport, now Terminal 3, provides visitors with their first experience of a modern, world-class city which is keeping pace with the best in the world. Terminal 3, from where international and many domestic carriers operate, has facilities which are on par with the world's most modern airports.

The Airport Metro Express, which takes one to the rail station in the heart of the city, in just 17 minutes, provides easy connectivity for visitors. The numerous flyovers, wide roads and bus and auto services also ensure that it is easy to explore the city.



4.7 Rajasthan

Rajasthan is a leading tourism State in the country. Its glorious heritage, colourful living traditions and vibrant culture are special attractions for both, domestic and foreign tourists. The tangible and intangible tourism products of the State offer immense potential for growth of the tourism industry. Development of tourism resources and increasing both, domestic and foreign tourist arrivals is a high priority area for the Union and State Governments.

Rajasthan attracts tourists for its Historical Forts, Palaces, Art and Culture. Every third foreign tourist visiting India also travels to Rajasthan as it is part of The Golden Triangle for tourists visiting India. Endowed with natural beauty and a great history, Rajasthan has a flourishing Tourism Industry. In Rajasthan tourism accounts for 2.7% of the SGSDP and 1.97% to the state's employment

The state contributes to 6% of foreign tourist arrival in the year 2017 securing 5th rank in the country. Rajasthan ranks 10th in domestic tourist arrival consistently for 2016 and 2017 registering a CAGR of 14.23% over the last 3 years.

Tourist attractions in Rajasthan

Rajasthan offers varied kind of tourism including heritage tourism, Spiritual tourism, Cultural tourism, Wildlife and eco-tourism, Desert tourism, MICE tourism, and adventure tourism. The major tourist destinations of Rajasthan are Alwar, Ajmer, Bikaner, Bundi , Bharatpur , Chittorgarh, Jaipur, Jaisalmer, Jodhpur, Kota , Mount Abu, Ranthambore, Shekhwati, Udaipur, Nathdwara, Ranakpur

The main Tourist attractions in Rajasthan are Palace on Wheels, Fairs And Festivals, Wildlife, Heritage, Adventure and Sports. Around 15 fairs and festivals like Camel festival, Bikaner, Kite Festival, Desert festival, Jaisalmer, Teej festival Jaipur etc are also great crowd puller in their own way.

Palaces: Rajasthan is best known for its historical hill forts & palaces; it is claimed as the best place for tourism-related to palaces. Following are some of the major Palaces to Visit in Rajasthan.

- Umaid Bhawan Palace: It is the largest Royal Palace in Rajasthan. It is also one of the largest private residences in the world.
- Lake Palace: It is now a luxury hotel located in Pichola Lake, Udaipur.
- Hawa Mahal: It is known as "Palace of Wind" or "Palace of Breeze" because there are more than 950 Windows in the Palace.
- Rambagh Palace: Formerly a Royal Palace now converted into a Heritage Hotel.
- Devi Garh Palace: Formerly a palace now converted into a Heritage Hotel, In 2006, The New York Times named it as one if leading luxurious hotel in Indian subcontinent.

Forts: Rajasthan is famous for its forts. Hill Forts of Palaces in Rajasthan are also a part of world heritage.

Hill Forts of Rajasthan	Other forts
Chittor Fort, Ranthambore Fort, Gagron Fort, Amber Fort, Jaisalmer Fort, Kumbhalgarh Fort, Mehrangarh Fort	Nahargarh Fort, Bhatner fort, Junagarh Fort, Lohagarh Fort, Taragarh Fort, Jalore Fort, Nagaur Fort, Shergrah Fort

Rajasthan Tourism Policy- initiatives

Rajasthan has a vision of doubling the state's foreign tourists by 2020 from 1.6 million to 3 million and in domestic tourists, up to 50 million.

The Rajasthan Tourism Unit Policy, 2015 primarily addresses issues relating to time bound conversion of land for tourism units including new hotels and heritage hotels, time bound approval of building plans, grant of Patta to heritage hotels, allotment of land for tourism units on DLC (District Level Committee) rates, applicability of Rajasthan Investment Promotion Scheme, 2014 (RIPS-2014) for tourism units and smooth and speedy implementation of the provisions of related departments like Revenue, Urban Development and Housing (UDH) & Local Self Government (LSG), Panchayati Raj, etc.

- Reserve Government land for tourism units
- Conversion of land for tourism units with nil conversion and developmental charges
- Conversion of Residential Land and Heritage Properties into Hotels and other Tourism Units with nil conversion charges
- Tourism units covered under this Policy shall be allowed double FAR i.e. 4.50, out of which 2.25 shall be without betterment levy
- All fiscal benefits as provided in Rajasthan Investment Promotion Scheme, 2014 (RIPS2014) for the Tourism Sector Enterprises shall be available to the eligible tourism units.
- The projects approved by the Ministry of Tourism, Government of India, if eligible under the provision of the Rajasthan Investment Promotion Scheme, 2014 (RIPS-2014), shall be allowed to avail the benefits as provided under RIPS-2014.
- All Tourism Units registered with the Department of Tourism will be directly eligible to become training partners under the Employment Linked Skill Training Program (ELSTP) subject to availability of infrastructure as per the guidelines of Rajasthan Skill and Livelihoods Development Corporation (RSLDC).
- Heritage hotels, on hiring trained youth (certified under RSLDC) would be eligible to get subsidies/incentives as per norms, if available.
- Special Incentives available for Heritage Hotels with Additional exemption of 25% on Stamp Duty will be available for more than 100 years

Rajasthan Government has identified various tourism projects to be developed in PPP mode as follows:

- Water based activities like cruise and boating in Chambal
- All-terrain vehicles in sand dunes of Jaisalmer, Bikaner etc
- Mountaineering and trekking in Mount Abu/Jaipur
- Establishing Golf resorts and convention centres
- Development of eco- tourism in various places
- Development of tourism in Sambhar and Jaisamand lake

4.8 Uttar Pradesh

Uttar Pradesh, has embarked on a new journey to strengthen the tourism infrastructure like most of the States. The proactive approach contains the following initiatives as depicted in the figure below.

Thrust on Public Private Partnership

- In order to overcome shortage of tourism infrastructure like hotels, resorts, public utilities at tourist places, connectivity, parking etc PPP mode shall be embraced

Integrated Tourism & Infrastructure Development Roadmap to be developed for the following places

- Garmukteshwar, Ayodhya (including 84-Kosi Parikrama)
- The Budhdhist Circuit
- Mathura District (84-Kosi Parikrama, Vrindavan, Goverdhan, Barsana, Gokul, Nandgaon)
- Bundelkhand, Naimisharnya (84 Kosi Parikrama & Misrikh), Chitrakoot

40 room hotel in Badrinath and 100 room hotel in Haridwar

Feasibility study of mythologically significant sites like Hastinapur, Barnava and others in UP to construct permanent structures/ installations

Integrated tourism development of cities by inviting planning and architecture colleges of the country

Tourism infrastructure to be upgraded in planned manner at identified areas, within 5-10kms of major tourist spots

Economic upliftment of the lesser priviledged using World Banks Pro poor tourism initiatives as a pilot. Facilities like drinking water, toilets, parking, paved roads. rides, parks and street lighting to be provided to enable quality experience

Remote destinations to be connected through state of the art infrastructure

Central schemes like Swadesh Darshan, PRASAD, Hunar Se Rozgar to be leveraged for addressing infrastructure gaps in the tourism sector

Proper co-ordination with other departments to ensure effective maintenence of water supply, sewerage system, approach roads and parking facilities at tourist destinations

Connecting highways to airports with street lights and public convinience facilities

Fiscal Incentives

The proposed fiscal incentives under the new policy are as indicated below:-

Tourism Circuit for Incentives

The tourism circuits having special emphasis and automatically qualifying for fiscal incentives during the policy period 2018-2023 are as follows:-

Fig 15: Snapshot of Fiscal Incentives



Encouragement to Investors

Number of schemes have been institutionalized in order to attract the investors. A synopsis has been presented in the Table below. The pre-requisites for applying for incentives have been mentioned in the annexure.

Types and Description of Incentives

Incentives Type	Description
Tourism Circuits Eligible for Incentives	The Ramayana Circuit, The Braj Circuit, Buddhist Circuit, Wildlife Eco – Tourism Circuit, Bundelkhand Circuit, Mahabharat Circuit , The Shakti Peeth Circuit, The Aadhyatmmik Circuit, The Sufi / Kabir Circuit, The Jain Circuit
	No of units in each location (varying between 5-10 units) are eligible for interest subsidy



	Eligible Capital Investment (except land cost)	Captal Investment (In Rs. Crs.)	Percentage of subsidy against fixed capital investment	Minimum Ceiling of Subsidy (In Rs. Crs.)	Other Conditions
Fiscal Incentives	Establishment of New Hotel	10-50	15%	7.5	
		>50	15%	10	
	Establishment of New Budget Hotel	2-10	15%	1.5	Location where 10 units are eligible
		2-10	20%	1.75	Location where 5 units are eligible
	New Resort	10-50	15%	7.5	
		Above 50	15%	10	
	New Sports Resort	1	10%	1	Only on Equipment cost
	New Tented Accommodation	0.2	20%	0.5	Only on successful permanent installation
	New Wellness Centre	2-50	15%	7.5	
		Above 50	15%	10	
	New Convention Centre	Up to 50	15%	7.5	
		Above 50	15%	10	

Incentives Type	Description				
Fiscal Incentives	Eligible Capital Investment (except land cost)	Captal Investment (In Rs. Crs.)	Percentage of subsidy against fixed capital investment	Minimum Ceiling of Subsidy (In Rs. Crs.)	Other Conditions
	Adventure tourism, Cruise Tourism, Houseboat	1	10%	1	Creation of Infrastructure & installation of permanent facility
	Light and Sound/ Laser Show	1	25%	2.5	Investment in equipment cost only
	New Theme Park	2	10%	1	Creation of infrastructure alongwith installation of equipment
Interest Subsidy to eligible tourism units in tourism circuits	If bank loan amount is not more than Rs5 Crs. Interest subsidy is to be awarded @ 5% of the loan amount with max amount of Rs. 25 lakhs/ annum.				
Stamp duty exemption	Eligible Tourism Units will qualify for 100% exemption of stamp duty and registration fee on sale/ lease/ transfer of land				
Conversion and land development charges	Land Use Conversion and development charges will be waived off for all new tourism units				
Support for Sustainable Tourism for carrying out energy audit	Assistance to be provided to eligible units upto 75% of the cost of carrying out Energy Audit by recognized institutions.				

Incentives Type	Description		
Incentive for promotion of innovation	The policy proposes promotion of technological innovation by providing • Technology introduced for the first time in the State • Significant leveraging of information Technology • Technology products having negligible carbon footprint		
	Project Cost in Rs	No. of people directly employed	Incentive Amount Rs
	10 – 50 Crs	50	10 lakhs
	1 -10 Crs	30	5 lakhs

Incentives Type	Description
Support for marketing and promotion	• All tourism service provider with the State Tourism department to be eligible for this incentive • 50% of the space rent actually paid subject to max of 30000 per national event or INR 60000/- per international event subject to a ceiling of 2 events per annum
Skill Development	• Reimbursement of 100% of hospitality related course fees for upto 10000/ person/ course • Training of tourist guides (registered with Department) with a stipend of Rs 5000. The reimbursement shall be limited to 100 participants in 3 years
Incentive for ICT Enablement	• Promotion of Usage of ICT in the tourism sector. Financial Assistance for conducting such events would be provided subject to a maximum of INR 5 lakhs • Tourist service provider providing Audio / Video Guide will be eligible forone time assiatance of 25% of the cost of equipments or INR 25 Lakhs, whichever is less
Assistance for Research in Tourism/ Hospitality Industry	• INR 10 lakhs shall be provided (maximum of 3 studies in a year) to recognized Travel Associations/ Hotel Association/ Chambers of Commerce Other trvel and hospitality bodies to carry our market research exercises.
Employment Generation Subsidy	• 75% subsidy for male Workers and 100% subsidy for female workers of FPF expenditure (Employers Contribution). The workers have to be domicile in the State for a period of 5 years
Special Incentive for Disabled	• Payroll assistance of Rs. 500/ worker/ month for units employing disabled workers
Support to Eco Tourism	• 100% reimbursement for achieving the standards and certifications from ecotourism society of Indiafor up to an amount of INR 1 lakh subject to a maximum of 2 units/ year
Support for reviving scarce art, music, craft, folk dance and cuisine	• An assistance of INR 5 lakhs. Recommendation to be provided by the committee constituted under the Chairmanship of District Magistrate of Specific District

4.9 Maharashtra

Maharashtra Tourism Policy 2016 comes into operation with effect from the 1 April, 2016 and shall remain in force for a period of ten years or until substituted. With a coastline of 720 kilometres, Maharashtra offers multiple types of destinations for its tourists. The Western Ghats and the Sahyadri mountain range offer hill stations and water reservoirs with semi-evergreen and deciduous forests while the Vidarbha region has dense forests and is home to several wild life sanctuaries and nature parks. The following strategies have been adopted for the growth of the tourism sector.

(A) Sector growth of 10% per annum and share of 15% in GSDP through tourism and tourism related activities

- Encouraging Mega Project investments in less developed tourism zones with high potential
- Monetization of existing land bank with MTDC
- Improving tourism infrastructure throughout the state by various concerned departments;
- And investor facilitation and ease of doing business.

(B) Create 1 million additional jobs in the tourism sector

- Increased focus on Mega and MSME tourism units.
- Offer additional incentives to employment-intensive Mega units.
- Leverage state and central skill development schemes.
- Consider Agro & Rural, Adventure sports, events-based tourism activities as a thrust sector.
- Promotion of tourism as an attractive sector for employment.

(C) Institutional & Governance Mechanism

A three-tier institutional & Governance mechanism will be created

- High Powered committee under the Chief Secretary for the approval of the Mega Projects
- A steering committee under the chairmanship of the Principal Secretary (Tourism)
- A District Tourism Promotion Committee (DTPC) to be formed

(D) Development of Special Tourism Districts/Zones

- Nagpur, Aurangabad and Sindhudurg will be earmarked as special tourism districts.
- In addition, the state will notify other special tourism zones/estates as when required.
- These regions will be given additional incentives and incentive period.
- Special marketing assistance to promote them as major tourism destinations of the state.

(E) Development of Tourism growth corridors

- Classify the state into separate tourist cities, tourist clusters and tourist corridors
- Employ a pilot project along a major highway and on its successful returns, replicate the process along five major highways in the state.

(F) Public Private Partnership Model for growth in Tourism Sector

- Develop shelf of projects and undertake these projects through the PPP/JV mode.

(G) Five-step approach for marketing and promotion

- Develop an integrated 360-degree marketing plan.
- Participation in international roadshows/ fairs/ G2B meetings etc.
- Develop a world class website for Maharashtra tourism.
- Develop brand equity of the state through theme-based tourism.
- Special incentives to media which promote Maharashtra tourism

Single Window Clearance for the Hospitality industry and live events in Maharashtra

Department of Tourism, Government of Maharashtra is in the process of creating a single-window clearance mechanism for the Hospitality industry and restaurants backed by an empowered committee.

The expected outcomes for the industry from this mechanism are –

I. Faster clearance and release,

II. Single source of information on licenses, processes, documents and requirements,

III. Increased transparency through application tracking and status checks,

IV. Enable online services for submission of all applications and records & single interface and

V. Cutting costs through minimizing delays.

Maharashtra Tourism Investor Facilitation Cell

The Department of Tourism, Government of Maharashtra has launched a Maharashtra Tourism Investor Facilitation cell which will act as a converging body to monitor the sector progress within the state. The major functions will include tourism investment promotion and investor facilitation in the state.

PPP Transaction Advisory Cell

The Department of Tourism, Government of Maharashtra will also launch a Public Private Partnership Transaction Advisory Cell which will provide advisory services for private sector participation in the developmental projects carried out across the state of Maharashtra. Public Private Projects will be a key conduit for greater infrastructure investment in developing Maharashtra.

In addition to the above-mentioned points, MTDC will also seek to monetize its land banks and other assets through global auction. Separate tenders will be launched for this purpose.

Shelf of Projects

Some of the high priority projects which DoT/MTDC is keen to undertake on the PPP/ JV mode are as follows:

- Develop at least 10 plots in next five years in the regions of VIdarbha, Ratnagiri, Sindhudurgand, Aurangabad, etc.
- Infrastructure development for the Elephanta island
- Integrated infrastructure development of Sindhudurg and Ratnagiri under the coastal tourism project announced by Ministry of Tourism, Government of India
- Development of sea fort circuit along with the existing fort circuits
- Ajanta and Ellora conservation project
- Sea world project on the Konkan coast
- Lonar project as mega tourism destination
- Development of the Lake Tourism circuit – Nagpur, Chandrapur and Wardha
- Development of wayside amenities along the major National and state highways in Maharashtra
- Development of the new Ashtavinayak Mega Circuit
- Development of wildlife tourism estates around Tadoba

In line with the above projects, Department of Tourism, in participation with key stakeholders will prepare DPRs and seek financial assistance under Central Financial Assistance (CFA) scheme under the Ministry of Tourism, Government of India. This funding will also be utilized in creating new circuits and special tourism zones such as

- Developing Sustainable Tourism
- Rural Tourism
- Caravan Tourism
- MICE Tourism
- Film Tourism
- Theme based tourism
- Coastal /Yacht/ Cruise Tourism
- Nature Tourism
- Tiger Eco-Tourism
- Adventure Tourism

- Water sports
- Medical Tourism
- Golf Course
- Camping and tent facilities
- Amusement Park
- Shacks

Maharashtra Tourism Policy Incentives

Government of Maharashtra realizes the multi-fold benefits of mega project investments in the tourism sector. A tourism unit will be awarded a mega / ultra- mega project status as per the Fixed Capital Investment (FCI) and the direct employment generated.

Additional incentives for Special tourism zones (STZ) and Special Tourism districts (STD)

No increase in water charges for a period of 10 years except urban area (i.e. Municipal Councils / Corporations area). However, any actual increase in the cost of operation of these services shall be recovered from the user as per the guidelines issued by the concerned Departments.

Licenses and Clearances

Tourism projects require various licenses and clearances like lodging house license, eating house license, Police permissions, license under the Shop & Establishment Act, and license under the Food & Drug Admin. Act etc. These licenses have to be renewed every year. By this Policy 2016, these licenses/permissions will require renewal every 5 years instead of the present annual renewal.

Additional Incentives for Sustainable tourism units

For all units which have successfully classified under the sustainable tourism practices, there will be extension in the eligible time period of incentives; time period will be approved by the HPC. 100% re-imbursement on achieving the certifications and standards from the Eco-tourism society of India up to an amount of INR 1 lakh.

Additional Incentives for MICE units

For all units which are successfully classified under the MICE tourism practices, there will be extension in the eligible time period of incentives. The extent of time period will be approved by the HPC

Additional Incentives for women entrepreneurs

New Tourism Units owned and managed by women entrepreneurs (with minimum equity participation of 51% in the entity) and the differently-abled will be entitled to an additional time period of incentives. The extent of time period will be approved by the HPC.

Additional incentives for skill development programs

Industry bodies / chambers of commerce / recognized tourism and hospitality institutions etc. are encouraged to utilize their CSR funds for the development of tourism human resources for the state. Special tourism development courses and modules will be imparted in association with the hoteliers, tour operators, etc. Reimbursement of 100% of Course Fees, up to a maximum of INR 12,500 /- per person for course duration of a fortnight or more. Monthly stipend of INR 7,500 /- to be given to tourist guides from the local areas who are registered under MTDC for a period of three months.

4.10 Kerala

Tourist Resorts (Kerala) Ltd. (KTIL), established under the Govt. of Kerala, is the agency for tourism investment promotion and infrastructure development in Kerala. It was incorporated in August 1989. KTIL's current activities are broadly segmented into PPP Model Projects, RE-NRK Partnership Projects and Govt. Owned Projects.

Provide basic infrastructure at destinations

Set up task force on Infrastructure Development, with Minister for Tourism as the Chairman, consisting of members of the tourism industry and representative of line departments. The Tourism department will coordinate with local self-governments, wherever necessary, assisting in managing waste and keeping destinations and major tourist corridors clean. Kerala Waste Free Destination (KWFD)' launched with the active participation of local bodies, NGOs and Self-Help Groups. The government would manage tourism resources under the custodianship of departments like Forests and Wildlife, Culture, Ports, KSEB, Irrigation, Fisheries and Agriculture.

Backwater based tourism activities are now concentrated in the Alappuzha region.

More than a thousand houseboats are now operated in this region, resulting in some backwater stretches in this region with density much above the carrying capacity. We have to disperse houseboat operation and cruise activities to relatively underused stretches and regions.

The Department, in association with Irrigation Department, will build infrastructure facilities like jetties, parking and loading bays and boarding points that will enable businesses to begin backwater tourism operations in new areas. Plans to introduce special incentives for starting houseboat operations in areas other than Vembanad lake. Approval from the department will be made mandatory for obtaining license from local self-governments for the homestays and Ayurveda centres. Department of Tourism, in association with Forests and Wild Life Department, will take steps to step up ecotourism initiatives, which will provide visitors new experiences and bring revenue to the eco-development committees. Development of local leisure destinations and enhancing local level experiences To showcase the diverse natural and cultural heritage of the state, separate thematic museums will be established in the state. The Department of Tourism will extend financial support for starting 10 such museums within a period of 10 years. There are known and lesser known attractions in the state. Ensuring essential facilities in these areas can enhance visitor experience. We will improve the facilities at the known destinations and create facilities at the lesser known destinations.

To create enabling environment for investment

The success of Kerala Tourism is mainly owed to the synergy between private and public sector. Fast track for clearance to tourism projects of investment above Rs. 10 crores. New subsidy system to promote Responsible Tourism (RT) practices. 15% of the total investment subject with maximum ceiling limit of Rs20 lakhs for investors classified under RT. In order to encourage local purchase by hotels to ensure economic benefit to local community, the government shall give a subsidy of 10 % on the value of local purchase for those properties which score 60% and above of total score in the economic responsibility part of the RT Classification Scheme for the first 3 years. For encouraging sustainable energy use by the tourism enterprises, the government shall provide industrial tariff on electricity and water charges for the first five years for establishments which score 60% and above of total score in the environmental responsibility part of the RT Classification Scheme for the first 3 years.

Tax holidays for accommodation units in lesser developed northern districts of the state

The northern districts of the state viz Kasargod, Kannur, Wayanad, Kozhikode, Malappuram and Palakkad which accounts for 45% of geographical area of the state has only 6% of share of international tourists 20% share of classified rooms. In order to encourage dispersed development to lesser developed areas the Department will provide luxury tax holidays for accommodation units located in the rural areas of these districts for the first 5 years.

4.11 Goa

Coastal tourism is "The tourism product Goa is famed for"; however, efforts need to be taken to upgrade/ organize the existing product and enhance the tourist experience in an increasingly competitive global coastal tourism scenario. Goa needs to improve its basic infrastructures, particularly in the most developed coastal areas to support the sustainable development of tourism growth.



Visiting Goa

Coastal Programs – Distribution of total estimated initial investment + Reinvestment, total expected cost (over the next 10 years) INR 493 Crores. The items are detailed below:

Infrastructure improvements envisaged – Regeneration / Upgrading of beaches

1. Beach access, cleaning, maintenance, water, electricity, sewerage, parking
2. Regulation, relocation from the beach and upgrade of shacks / and retail shops.
3. Raising the quality, safety and sanitation level of the most popular beaches in Goa

Description and tasks

- Improve access: restrain volume of vehicles with direct beach access; improve urban landscape to access the area; reorganize retail where invading roads and sidewalks.
- Improve parking: create large parking spaces away from the beach and tourist bus/ train transportation to the beach; parking near the beach should be charged for (at a reasonably high rate) with parking agents to control traffic and payment. Limit access to these nearby parking areas when full.
- Improve urban sidewalks within the main areas: pedestrian walkways clearly separated from car and motorcycle traffic; create biking routes.
- Improve shacks: Taking into consideration recommendations of GCZMA study and NGT approval. Give quality labels to best shacks and special Goan cuisine label for those who would like to apply and meet standards.
- Improve the beach itself: public showers; watching towers and rescue team; separate bathing areas from water-sport areas; daily beach cleaning; etc.
- Improve retail offer: reorganize retail space and create clusters of retail paired to shacks clusters or adjacent. Encourage special labels for Goan handicraft.
- As a result of the above measures, a paved promenade free of commercial outlets should be created to separate the beach itself from the shacks and retail.

As part of Culture & Heritage Programs –Total estimated initial investment + Reinvestment, a total of INR 144.5 Crores has been earmarked for next 10 years towards restoration of Forts, monuments, villages, old Goan houses, culinary, cultural events, the Goan multimedia experience and handicrafts.

Adventure & Sports tourism through creation of a network of hiking and biking trails in each main hinterland taluka, using picturesque landscapes and interesting nature sports.A total of INR 283 Crores has been budgeted for next 10 years towards Nature based programs like Discovery river cruises, Agro tourism, Wellness tourism, Adventure & Sports tourism, etc.

Other initiatives:

- An eco-friendly 9-hole golf course paired with a renown international hotel brand
- Up gradation & improvement of helipad near the Aguada Jail

- A world-class Convention Centre in the vicinity of the proposed Mopa airport to launch Goa as a competitive destination for MICE tourism
- Weddings and incentive trips - Goa by virtue of its lush green forests and fields, as well as its picturesque beaches is a key venue for destination weddings.

4.12 Andhra Pradesh

As part of its Tourism Mission strategy, the State offers nine major Tourism themes: 1) Beach & Water-based 2) Eco-tourism 3) Buddhist 4) Religious 5) Heritage 6) Meetings, Incentives, Conferences, and Exhibitions (MICE)& Infrastructure development 7) Recreation/Adventure 8) Spiritual/Wellness 9) Medical These nine major themes are further categorized into 42 sub-themes. Various policy instruments have been detailed in this policy document to facilitate achievement of the policy targets:

- Enabling a conducive environment for setting up and operating Tourism infrastructure projects
- Incentive and encourage to promote private investment
- Industry status for Tourism Investment Project for specified purpose
- Comprehensive skill development and capacity building in tourism sector
- Marketing and branding of sunrise state as global tourist destination and facilitating investment through a dedicated investment promotion team

Policy Highlights

Fiscal incentives:

- Automatic land conversion, 100% reimbursement of registration and stamp duty, Reduce rate of energy tariff, Investment subsidy based on investment size.

Non fiscal incentives:

- Complimentary / linkage infrastructure for eligible projects, Single desk approvals, marketing supports, special incentives for all incentives over USD 33 Million

Land lease policy:

- Land Lease Policy is applicable for tourism projects where land requirement is less than 10 Acres
- Lease period – 33 years+ 33 years
- Upset price- 2% of basic market value
- Conditional land lease agreement Government of Andhra Pradesh has planned many tourism initiatives by envisaging following tourism projects
- INS Viraat is to be developed in PPP mode. The project will be developed to have 5 star hotel, convention center, gaming zone and museum.

- Havelock Bridge is located in Rajahmundy. It is one of the biggest bridges with length of 2.7 km that connects east and west Godavari districts. The project is to be developed with project components such as walkway, shopping zone and view point.

- Development of Bhavani Island and its neighboring island & island group has 700 acres earmarked for development of entertainment zone, eco zone, wellness resort and retreat zone. The project shall be developed through PPP mode.

- Government of Andhra Pradesh is planning to develop Madhurwada, Vishakhapatnam in to a tourist destination with 5 star hotel, amusement park, resort and hotels, international convention center and family entertainment center.

4.13 Telengana

The Telangana state historically has a variety of attractions including mountains hills, wildlife, forests, forts and temples. Telangana region has a rich cultural heritage and is known for its rich history, architecture and culture. This region has all required qualities for emerging as tourist destination in India. Therefore, the government has been trying to act in developing basic infrastructure. At present most of the tourists arrival in the Telangana State is confined to Hyderabad, the state capital, and some pilgrim centres. However, in the recent years, the State has become a major attraction for medical tourism and also business tourism with the promotion of MICE and development of convention centres. The government is focusing on promoting other areas of tourism such as ecotourism, tribal tourism, heritage tourism and educational tourism by building necessary infrastructure. Telangana is not only one of the preferred destinations for domestic, but also for foreign tourists. It is home for famous heritage monuments, natural spots, and divine shrines. State offers the following categories of tourism:

- Heritage Tourism like Charminar, Qutub Shahi Tombs, Paigah Tombs, Falaknama Palace, Chowmahalla, Palace, Golconka Fort, Khammam Fort, Warangal Fort and Bhongir fort

- Religious Tourism like : Ramappa Temple, Bhadrachalam, Alampur Jogulamba Temple, Medak Church, Keesara Temple, Basara, Thousand Pillar Temple and Yadigirigutta Temple

- Forest and Recreation Tourism like Nehru Zoological Park, Etunagarm wildlife sanctuary, Nagarjuna – Srisailam Tiger Reserve and Pocharam sanctuary

- Nature tourism like : Kuntala waterfalls, Pochera waterfalls, Laknavaram, Bogatha waterfalls, Mallela Thertham waterfall and Ananthagiri hills

Government of Telangana is planning the following circuits for overall tourism development:

- Hyderabad Heritage Circuit: The Qutb Shahi Heritage Park, located close to famous Golkonda Fort in Hyderabad shall be developed as Hyderabad Heritage Circuit.

- Tribal circuit in Jayashankar Bhoopalapally district covers the major Tirbal belts. The region has soothing river, beautiful lakes, dense forests, a wildlife sanctuary, tribal culture, pilgrimage, heritage structures and architectural monuments, a fi ne blend of new and old. The tribal circuit includes the following places- Mulugu (Tribal), Laknavaram (Tribal), Medaram (Tribal), Tadvi (Tribal & Wildlife), Damarvi (Tribal & Eco Tourism)

- Eco-tourism circuit at Nagarkurnool District includes the following destinations- Somasila riverside (Religious), Akkamahdevi caves (Eco tourism), Uma Maheshwaram Temple (Religious),Mannur (Eco Tourism), Farahbad (Eco tourism), Mallela Theertham waterfalls (Eco tourism) and Srisailam (Religious)

- Tribal & Eco-tourism Circuit in Adilabad, Nirmal and Kumarambheem-Asifabad Districts. This circuit includes the following places – Dichpally (Heritage), Shyamgadh fort (Heritage), Koratikal waterfall (ecotourism), Kuntala waterfall (Eco Tourism), Mysterious caves (religious & ecotourism)

4.14 Tamil Nadu

Tamil Nadu has unique culture and rich tourism potential, tourists from upcountry and abroad gathers the tourist spots throughout the year. To facilitate the tourists, Tamil Nadu Tourism has been taking enduring efforts to promote tourist places by providing basic infrastructure like public convenience, rest shed, drinking water, road improvement, car parking, etc. The state offers different types of tourism activities like leisure, pilgrimage, heritage, adventure, cruise, rural, eco, medical, business, culture, education and sports tourism. The state is having 5 UNESCO recognized World Heritage Sites - Great Living Chola Temples – Brihadeeswaram Temple (Gangaikonda), Airavateshwarar Temple (Darasuram) and Brihadeeswarar Temple (Thanjavur), Group of Monuments at Mammallapuram and Nilgiri Mountain Railway at Ooty. The state is well connected roads and 4 international Airports. Chennai has been designated as "Creative City for Music" by UNESCO.

Strategy of the State Government

The state government has taken up following strategies for the upgradation of existing tourism infrastructure as well as building up new infrastructure for the overall development of tourism in the state.

- Integrated development of high-priority tourism infrastructure in high potential tourism circuits.

- Enhanced connectivity, utilities and tourist services.

- Improved co-ordination efforts of multiple agencies.

- Promotion of environmentally and culturally sustainable and socially inclusive tourism development

- Encouragement of private sector and community participation in tourism

- Capacity building and human resources development for sustainable tourism and destination management through employment generation, poverty alleviation, environmental regeneration, advancement of women and disadvantaged groups. Participation in Domestic and International Marketing meets, Publicity Campaigns and Exhibitions

- Development of Coastal Tourism.
- Development of Eco-Tourism holistically without causing damage to environment and wildlife.
- Development of Meetings, Incentives, Conventions, Exhibitions (MICE) Tourism, Niche Tourism, etc. tourism infrastructure
- State Funded Schemes Tourism Department is sanctioning funds for the development of basic infrastructure facilities at tourist destinations for the benefit of tourists visiting Tamil Nadu. The major components, namely, rest sheds, toilets, approach roads, dress changing rooms, parking lots, drinking water, illumination, signages etc., are provided in the tourist centres.

The Ministry of Tourism, Government of India (MOT, GOI) has launched the Swadesh Darshan scheme with a vision to develop theme based tourist circuits on the principles of high tourist value of all stakeholders to enrich tourist experience and enhance employment opportunities. The identified, Coastal Tourist Locations in Tamil Nadu are: Chennai–Marina Beach & Besant Nagar Beach, Mamallapuram Beach, Rameswaram, Manapadu and Kanniyakumari. A sum of Rs.99.91 crores has been sanctioned.

Key Initiatives

The following initiatives have been taken by the local government.

I. Eight beaches in five districts of Tamil Nadu have been identified for integrated development of coastal theme tourists circuits

II. Mahabalipuram has been identified as one of the iconic tourist destinations

iii. Conducting Hot Air Balloon Festival (January), Sail & Surf Festival (January, Pongal Tourist Festival (January), Summer Festival (at all important hill stations in May), World Tourism Day (September), Tea & Tourism Festival (November – December), Indian Dance Festival (at Mamallapuram from Decemebr to January), etc. every year to attract inbound tourists

iv. Tie-up arrangements have been made with travel portal for online booking of TTDC Hotels and Tours

v. Setting up of Tourist Information Centres at different point of entry and exit of the major destination towns

vi. Operation of helicopter services at important tourist destinations and launch of sea-plane service are few of the innovative projects under anvil



5 | The Road Ahead

An unprecedented number of people are travelling around the world, and the figures are only expected to rise, with international arrivals growing from 25 million in the 1950's to 1.2 billion in 2016 and to 1.8 billion by 2030. Having outperformed the global economy for the sixth consecutive year, the industry has proven to be resilient to both geopolitical uncertainty and economic volatility. The aviation, travel and tourism industry accounts for 10% of global GDP and 10% of jobs on the planet. The industry should be a priority for countries around the world given its ability to make a real difference to the lives of people by driving growth, creating jobs, reducing poverty and fostering development and tolerance.

In recent years, India has tremendously improved its travel and tourism competitiveness, rising from 65th position in 2013 to 40th position in The Travel & Tourism Competitiveness Index Report 2017. India is now one of the fastest-growing aviation markets in the world, with its domestic demand reaching nearly 100 million passengers. Yet foreign tourist arrivals have remained relatively low, at 10 million, providing India with a unique opportunity to consider how to build demand and create adequate supply for its travel and tourism industry.

For the purpose of this research, it has been estimated that with a growth in foreign tourist arrivals to 20 million in India, the upside opportunity would be $20 billion in incremental tourism receipts from international travellers and the creation of approximately 1 million additional jobs.

Focusing on its opportunities and understanding its current limitations will allow India to realize its objective of doubling the foreign tourist arrivals by 2023 and becoming the largest aviation market by 2030. Already endowed with incredible natural beauty and a unique cultural heritage and diversity, India must enhance its value proposition and foster an enabling environment for the industry to prosper.

With 29 states, 4,000 cities, a rich history and incredible diversity of culture, India's travel and tourism industry has tremendous potential to serve as an engine for economic growth, job creation and development.

On its current growth trajectory, India's foreign tourist arrivals are targeted to reach 20 million by 2023. Travel and tourism currently accounts for 9.6% of India's GDP (88% of which comes from domestic travel) and supports 9.3% of the country's total jobs (or 40.3 million jobs).11 Today, 12% of India's tourism GDP is derived from international tourism; it accounts for only 5.4% of the country's exports, compared to a global average of 6.6%.

India's vast cultural and natural resources as well as its price competitiveness remain key drivers of its overall competitiveness. Yet, the country's cultural resources are still underutilized, with over 600,000 villages with their own cultures and heritage that could be leveraged to create unique experiences for travellers.

To increase and facilitate travel to India, the government has placed significant emphasis on ground transportation and international openness. Stronger visa policies and an e-tourist visa have produced an increase in international arrivals to the country. While health and hygiene conditions, human resources and technology readiness are improving, further progress is needed across these dimensions. Addressing tourist service infrastructure, security concerns and environmental sustainability are also key to achieving India's travel and tourism potential.

To reach its goal of becoming the world's largest aviation market by 2030 and welcoming 20 million foreign tourists by 2023, India must enhance its value proposition and foster a conducive environment. By doing so, it will be better able to build demand and attract tourists, while simultaneously creating adequate supply through the development of physical and digital infrastructure and progressive legislation.

I. Building demand for tourism

To enable India to increase its international arrivals and continue to generate employment opportunities to reach nearly 50 million new positions by 2027, emphasis should be placed on boosting demand for India as a destination. To do so, it is essential to create stimulating value propositions, foster a tourist friendly environment and brand the country as a "must-discover" destination.

II. Niche tourism

As India develops its value proposition for each of its niche tourism markets, it should consider four key areas, namely, the location of the stay, the activities at the destination, the ability to arrive to and commute within the destination, as well as the ease of interaction with the service provider.

The location of the stay could consist of traditional hotels, jungle resorts, houseboats, plantation estates, and even cave and tree houses. Activities spanning adventures, wellness, wildlife, culture and gastronomy should be developed to enable travellers to discover the real essence of the destination. Infrastructure and service providers should support that last mile transportation and uplift customer experience.

One niche area in which India already excels is medical tourism, thanks to the high-quality yet affordable healthcare it offers patients by world-class hospitals and tertiary care facilities. India's earnings from medical tourism could surpass $8 billion by 2020. Additionally, India's leadership in yoga and Ayurveda has opened up the wellness tourism space.

Similarly, ecotourism can be a win-win situation for local Indian communities and tourists, given that the country is a hotspot of biodiversity with a rich natural heritage. During their visit to India, tourists could spend time in national parks, wildlife sanctuaries and biosphere reserves, while also helping to maintain the ecosystem.

MICE Tourism continues to be one of the major revenue spinners of modern times. Not only it brings into play the various aspects of tourism into one solid concept but also allows the opportunity for the host city to develop its economy in leaps and bounds. The estimated market size of MICE in India is Rs37576 crores in which nearly 60% comes from MIC i.e. meeting, incentive and conference and there is tremendous potential to grow if India as destinations can be marketed well along with offering world class MICE infrastructure which is currently not adequate.

Finally, cruise tourism could emerge as an advantageous opportunity in light of India's 7,500 km coastline. Cruising is one of the most dynamic and fastest-growing segments of leisure travel, with an estimated market size of 1.2 million cruise visitors by 2030 according to Government of India projections.

III. Branding tourist destinations

The States and Union Territories' must think about their branding their tourist destinations carefully to ensure it is perceived as authentic by tourists. India was very successful at creating a distinctive identity when it conceptualized and launched its Incredible India campaign. The campaign helped establish the country as a high-end destination, leading to a significant increase in tourist traffic.

IV. Involve Private Sector and engage actively

It is necessary to attract and involve Private Sector Investors through PPP mode which is mutually financially viable. There is a need to initiate deep Involvement with the Private Sector players & allow deeper engagement. The owner can play a vital role to development of the tourism industry in India and have the potential to create new destination hotspot for attracting new tourists from abroad. Such partnerships bring together different objectives and skills, and resources in a formal or informal voluntary partnership to improve the attractiveness of destination, its value, associated market efficiency, and the overall management of tourism. The focus of Government to involve private sector to boost emerging themes like Cruise & Coastal tourism, Sports & Adventure, Religious, Medical & Wellness, Amusement & Theme parks and MICE Tourism. In addition to above there is tremendous opportunity to engage competent private investors to run and maintain different Heritage Site, Old buildings, Forts etc. through PPP mode which will finally enhance the overall economy and employment at local level.

NOTES



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