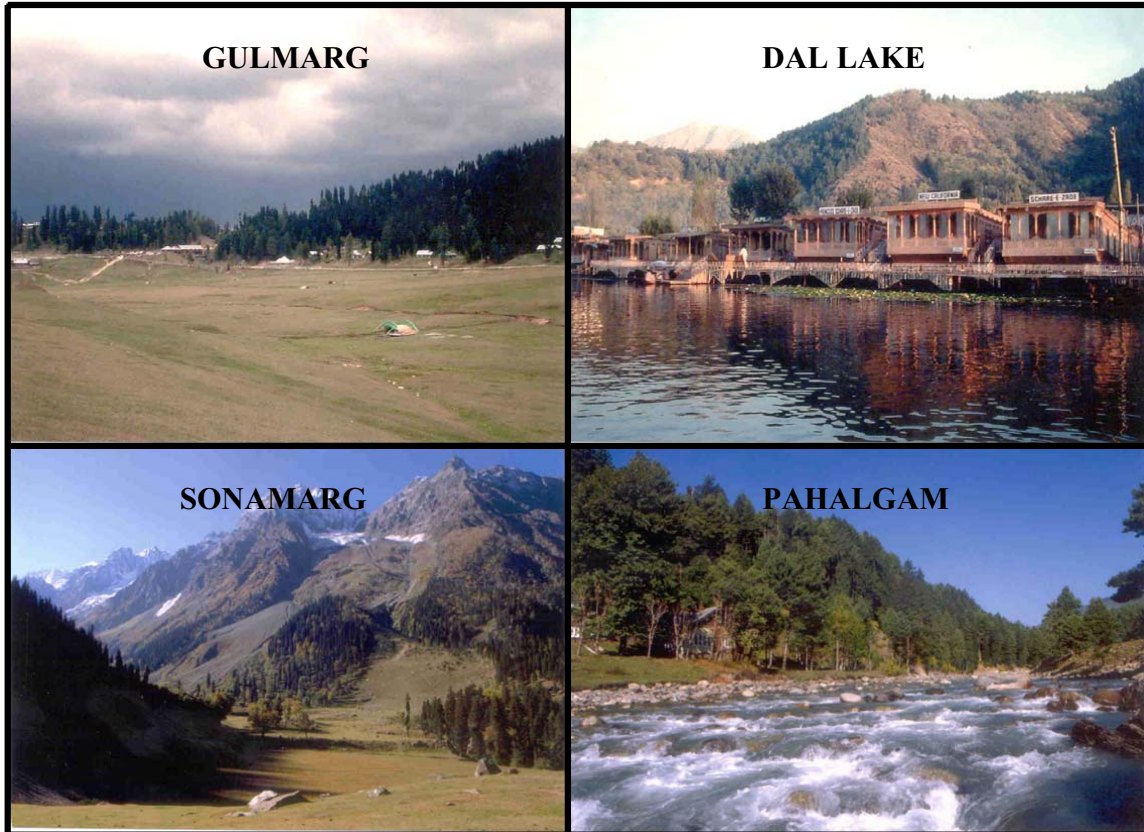


**FINAL REPORT
OF
20 YEAR PERSPECTIVE PLAN FOR SUSTAINABLE DEVELOPMENT OF
TOURISM
IN
JAMMU & KASHMIR**



**PREPARED
FOR
MINISTRY OF TOURISM
GOVERNMENT OF INDIA, NEW DELHI**

Incredible India

BY

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PREFACE

In the contemporary period, tourism has become a big business and has been considered as a fastest growing industry. This is primarily a service industry because it does not produce goods but extends services to various classes of people. Tourism can play an effective role in integrating the entire universe. Tourism opens up a new window for resources, both investments and generation, leading to employment generation as well as socio-economic development of the local populace at large.

The tourism industry is identified as an important 'tiger' industry for the first decade of the current century. India's share in international tourist travel is abysmally low. Reasons are many but the main factor is that the geography and history of India are little known outside South Asia and, therefore, remain insignificant for international tourists. From time to time, India has evoked interest of international tourists for factor never contemplated in any planning. For example, the worldwide screening of film 'Gandhi' in the period 1983-85 provided a major impetus for international travelers to visit India.

The Ministry of Tourism recently desired all the State governments to provide schemes for the promotion of regional tourism and in the same manner the State Government of J & K was asked to do likewise. The Ministry of Tourism also appointed various expert groups to undertake surveys and studies and recommend perspective plans for the development of tourism extended over a period of 20 years. A set of guidelines were also issued, which the expert groups had to keep in mind while undertaking their work to formulate the perspective plan.

M/s Santek Consultants Private Limited, Delhi, were assigned the task to prepare a 20 years perspective plan for the sustainable development of tourism in the State of J & K. The assignment has come at a time when the State of J & K is going through a very delicate and violence prone period.

(i)

The State of J & K has three distinct regions, viz. Jammu, Kashmir and Ladakh and all three have immense potential for tourism from both domestic as well as international tourists. There are number of locations which are untapped and can be developed as major tourist destinations, having all the natural as well as the cultural resources for attracting tourists. Some of the important natural resources are excellent climate, beautiful lakes, locations for adventure sports, wild life, trout fish, natural and manmade parks like Shalimar and Nishat of the Mughal period, flora and fauna, alpine forests, natural waterfalls and streams etc. As for the cultural resources, the state has some of the most important religious shrines of Hindus, historical monuments, plethora of local festivals, distinct cuisine, craftsmanship skills for intricate and fine woodwork, woolens, carpets, textiles, paper mache, inlay work etc.

But the other grave reality is that tourism has been directly hit at least in the region of Kashmir Valley. There is a state of despondency in all support services to the State tourism industry. Within Kashmir Valley the level of unemployment amongst youth is high and assuming dangerous proportion. Because of the violence prone environment, no well-known financial institutions are willing to invest in the State. Even the routine work of survey sampling as a part of this assignment has been found to be a highly dangerous activity for the individual.

M/s Santek Consultants Private Limited, have attempted under these very trying conditions to develop programmes of developmental activities which are related to the tourist industry and these have been incorporated between the covers of this proposal. The index provides an idea of the content, which are laid chapter-wise. The executive summary encompassing recommendation is given in the beginning of the Report. The 20 years perspective plan follows the objective to provide employment opportunities, improve the per capita income in families, raise general level of living standards without allowing for a superficial emergence of wealth and opulence in the local society.

During the fieldwork the consultants have come across a vast amount of intelligent activity, most practical in nature, having been submitted to the State Government which had their early death (as

none were ever implemented). At the same time, our very unfortunate experience has been that outside the State, there has been no in-depth studies which would specialise in various activities of an economic growth including tourism.

The apprehension however is that keeping in view the development of the economy and the political characteristics in this region, the 20 years perspective plan may also end up in the similar manner finally as many of the very well intentional similar schemes which have been contemplated in the past.

A simple aid otherwise, like a detailed map of the State of J&K is hard to come by today because the Central Government has put restrictions on the printing of such maps of the State. Within the State of J&K, it is not possible for a student to acquire a map of the State showing its physical features and road-links. The maps for tourists available are of German origin, which have been pirated and are readily available with the operators of mountain trekking. This simply indicates the kind of monumental problems, which planners, visualizing a 20 years perspective in developmental activities, will face when they have to put their programmes into print and visualize a future reality.

The Consultants were also advised to recommend the financial outlay of suggested proposals, the time table of commissioning the projects over the 20 years period and attempted to predict the potential of creating new jobs. The reader will find that in some of the chapters such financial proposals are missing. The reason is that no necessity was felt for adding financial burden on existing sponsored schemes and the present expenditure levels were sufficient to sustain the pattern of growth; what was lacking was a direction, proper leadership and proper planning. The Consultants, therefore, have attempted to fill the vacuum to the maximum extent possible in areas, which they were privileged to survey during the course of their tours.

Elsewhere, specific recommendations with financial outlays for Government's consideration have been given. The Government of India may underwrite specific schemes to create job opportunities for the

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people in the State of J & K. Many of the schemes envisage creation of job opportunities outside the State bureaucracy. This is deliberate as the State Bureaucracy is already over-burdened by a vast number of persons on their rolls, and the numbers need to be decreased.

The Consultants are grateful to all the senior officers of the State Government, representatives of the various trade bodies and individuals with whom they interacted in the assigned period of this work to help arrive at the conclusions. Many of the recommendations made may not be received enthusiastically. Some surgeries on the 'patient' have been recommended. The Consultants plead forgiveness for any unintentional hurt caused to the sentiments of any individual or group.

Sanjay Jain
Director

ACKNOWLEDGEMENT

We are also grateful to the Ministry of Tourism & Culture, Government of India, for assigning this prestigious task of Preparing the “20 Year Perspective Plan for Sustainable Development of Tourism in the State of Jammu & Kashmir.” We are in particular grateful to the officials of the Ministry of Tourism & Culture, Government of India & the Department of Tourism, for extending all cooperation and help during the conduct of this study. We are also grateful to all the senior officers of the State Government, representatives of the various associations (Hotels, Houseboats, etc.), trade bodies and individuals with whom we had interacted in the assigned period of this work, to help arrive at the conclusions, for developing the Perspective Plan.

Sanjay Jain
Director

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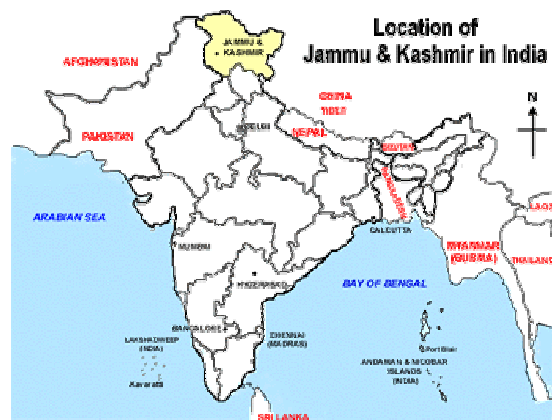
EXECUTIVE SUMMARY

BACK GROUND OF JAMMU AND KASHMIR

Geographical Location

Strategically located Jammu and Kashmir State constitutes the northern most extremity of India.

The State of Jammu & Kashmir is situated in extreme north of India between 32° – 15' to 37° – 05' latitude north and 72° -35' to 80° –20' longitude east. It is bounded by China in the north and east, by Afghanistan in the north-west and by Pakistan in the west. Punjab in the west. Punjab and Himachal Pradesh States border it in the south. Jammu & Kashmir State has a geographical area of 222,236 sq. kms. comprising 6.93 per cent of the total Indian territory



The 101,387 sq. km. area of State is demarcated into 14 districts, 59 tehsils and 121 C.D. blocks which is further delimited into 2,661 panchayats, 75 urban areas and 6,652 villages. The 75 towns include 7 urban agglomerations also.

The State is well connected with rest of the country by air, rail and road . The Indian Airlines and private airlines operate regular flights to Srinagar, Jammu and Leh.

It has four **geographical zones** of

- Sub-mountain and semi-mountain plain known as kandi or dry belt,
- The Shivalak ranges,
- The high mountain zone constituting the Kashmir Valley, Pir Panchal range and its off-shoots including Doda, Poonch and Rajouri districts and part of Kathua and Udhampur districts
- The middle run of the Indus river comprising Leh and Kargil.

The State of Jammu and Kashmir is the northern most state of India comprising **three distinct Climatic regions** viz. Arctic cold desert areas of Ladakh, temperate Kashmir valley and sub-tropical region of Jammu.

The State of J&K in spite of our effort to read the whole area as one actually comprises of three very distinct special regions, that of Kashmir herein referred to as Valley, Jammu which also includes areas of Rajouri and Poonch and lastly the region of Ladakh including areas of Kargil, Drass and Zaskar. By the very nomenclature of the State, Jammu & Kashmir, the region comprising of Ladakh was overlooked for a considerable time by the State Government as a place for developing tourism.

The State of J & K has three distinct regions, viz. Jammu, Kashmir and Ladakh and all three have immense potential for tourism from both domestic as well as international tourists. There are number of locations which are untapped and can be developed as major tourist destinations, having all the natural as well as the cultural resources for attracting tourists. Some of the important natural resources are excellent climate, beautiful lakes, locations for adventure sports, wild life, trout fish, natural and manmade parks like Shalimar and Nishat of the Mughal period, flora and fauna, alpine forests, natural waterfalls and streams, etc. As for the cultural resources, the state has some of the most important religious shrines of Hindus, historical monuments, plethora of local festivals, distinct cuisine, craftsmanship skills for intricate and fine woodwork, woollens, carpets, textiles, paper mache, inlay work, etc.

The state abounds in large lakes, the biggest of the fresh water lake being Wular, Dal and Manasbal lakes. The biggest brackish water lakes are Tso Moriri and Pangong Tso in Ladakh region. A large number of smaller lakes in the higher reaches of the mountain ranges provide surprises for those who can reach them trekking.

APPROACH FOR FORMULATION OF PERSPECTIVE PLAN

Phasial Approach for the Perspective Planning

In order to have a practical approach so as to facilitate decision making the consultants have split up various issues to be addressed into time frame of 5, 10 and 20 years as regards implementation. The plan envisages the revival of administration and its existing infrastructure within a time frame of initial 5 year period. It further envisages launching of certain practical and acceptable proposals in the first 10 years, which will go towards promoting sustainable development of the tourism industry in the state. And finally it envisages initiation and implementation of innovative projects having a long gestation

period, which are capital intensive, in a time frame of 20 years. However, these would require further fine-tuning by the state government after getting inputs from the related agencies / departments / organisations. Needless to say, Tourism is the lifeline of Jammu & Kashmir and all possible efforts need to be undertaken for retaining, maintaining and sustaining it.

METHODOLOGY

The basic methodology of this study was to collect secondary as well as primary data from different sources coupled with sample surveys and expert visits and use them as inputs for formulating this Perspective Plan.

Universe of the Study

Universe of the Study would be the whole state of Jammu & Kashmir.

Sampling Plan

Selection of Regions

The State of Jammu & Kashmir consists of three regions, all three being distinct geographically and culturally and attracting tourists because of their unique special features. Hence all the three regions, viz. Jammu, Kashmir and Ladakh, were selected for undertaking the survey.

Sampling Frame

Sampling frame constituted all the districts of J&K and the various stakeholders, directly or indirectly associated with the Tourism industry in Jammu & Kashmir.

Data Collection

Both Primary and Secondary data been collected from various stakeholders for the state of J & K.

Primary Data collection

Tools used for primary data collection :

- * Questionnaire / Schedules
- * Postal Survey
- * Interviews / Discussions
- * Focus Group Discussions

Sources of Primary Data Collection

The Primary data has been collected from the following stakeholders in the tourism set-up :-

- i) Officials / Staff of hotels and other boarding and lodging facilities like houseboats, huts, etc.
- ii) Visiting tourists in the vicinity both domestic and foreign
- iii) Prospective tourists
- iv) Local inhabitants/ Shopkeepers / Tourist Guides
- v) Artisans, Craftsmen
- vi) Travel Agents / Tour Operators
- vii) Other related agencies and persons

Secondary Data Collection

The secondary data has been collected through personal visits and from various sources / departments such as :-

- . Directorate of Tourism, Govt. of J & K
- . JKTDC, Govt. of J & K
- . J&K Pollution Control Board, Govt. of J & K
- . Directorate of Youth Services and Sports, Govt. of J & K
- . J & K State Sports Council, Govt. of J & K
- . Directorate of Economics & Statistics, Govt. of J & K
- . Department of Planning & Monitoring, Govt. of J & K
- . Directorate of Handicraft, Govt. of J & K
- . Department of Fisheries, Govt. of J & K
- . J & K Academy of Art, Culture and Languages, Govt. of J & K
- . Department of Forests, Govt. of J & K
- . Department of Finance, Govt. of J & K
- . Wild Life Department, Govt. of J & K
- . R & B (PWD) Secretariat, Govt. of J & K
- . (P&S) Power Development Department, Govt. of J & K

- . Department of Area Planning, Govt. of J & K
- . Department of Ladakh Affairs, Govt. of J & K
- . Archaeological Survey of India, Govt. of India
- . Lakes and Waterways Development Authority, Govt. of J & K
- . Department of Gardens and Parks, Govt. of J & K
- . Directorate of Archaeology J&K, Govt. of J & K
- . Department of Information, Govt. of J & K
- . State Commission of Women, Govt. of J & K
- . Ministry of Tourism, Govt. of India
- . Tourism Corporation of India

Sample Units

Successful contacts were established with the following number of stake holders for primary data collection from the three regions of the state:-

- o 255 Tourists
- o 81 Local Inhabitants
- o 26 Travel Agents
- o 83 Hoteliers

Global Tourism Scenario

Tourism is the fastest growing industry globally accounting for 7% of total capital investment in the world and annual revenues approaching USD 500 Billion (USD 476 Billion in the year 2000 as per WTO estimates). There were 698 million international tourist arrivals in 2000, which are expected to reach 1.6 billion by 2020 as per the World Tourism Organisation (WTO) estimates. The airline arrivals are expected to double by 2010. The World Travel and Tourism Council (WTTC) estimated global tourism turnover to account for 10.8% of the global GDP in 2001. It accounts for roughly 35 per cent of global exports of services and over 8% of global exports of goods(WTO). In 1995, 11 per cent of the global workforce - over 200 million people - were directly or indirectly employed in tourism which

is predicted to rise to 340 million by 2005 (International Labour Organisation - ILO). These figures make tourism the world's largest employer and arguably it's largest business in terms of income.

Growth of tourism

International tourist arrivals increased from 25 million in 1950 to 698 million in 2000, and are predicted to grow to 1.6 billion by 2020 (WTO). Globally, the tourism industry is growing at 4.6 per cent (WTTC). The number of air passengers rose from 9 million in 1945 to 88 million in 1972, 344 million in 1994 and 1.6 billion in 1999, and is expected to double again by 2010. (International Civil Aviation Organisation; *In Focus*, Autumn 2000).

Factors in tourism's growth include:

- **Increasing leisure time:** In 1936, the International Labour Organisation convention provided for one week's leave per year for workers in developed countries. In 1970, this was expanded to three weeks, and in 1999 to four weeks.
- **Increased disposable income:** Spending on leisure in the UK has risen from 9 per cent of household income in 1978 to 17 per cent in 1998 (Tearfund: *Tourism: An Ethical Issue*, 2000). In 1998-99, the UK Family Expenditure Survey found UK households spent £936 a year on holidays: 4.5 times more in real terms than 30 years previously.
- **Falling real cost of air travel:** Between 1978 and 1998, the real cost of air travel fell by 35 per cent (Air Travel Association). A thousand miles of air travel now requires 61 hours less work than it did a generation ago.

Tourism : INDIA

The tourism industry in India has come a long way from just 15,000 tourists in 1950 to 2.64 million in 2000. The foreign tourist arrivals into India too have increased significantly. However, it is a different story that India's share in world tourism continues to be at a dismal low.

In the last one decade, domestic tourism in the country has grown by over 100 million from 63.8 million in 1990 to 176 million in 1999. However, much of this traffic is concentrated in states like Rajasthan, Maharashtra, Gujarat, Kerala, Goa, Himachal Pradesh, Uttaranchal, etc. But unfortunately the flow of domestic tourists into the eastern and north-eastern parts of the country are much lower compared to these states, although, there is a very large outflow of tourists from the eastern states, particularly from West Bengal to other parts of the country. But, the eastern states have all the potentials to become ultimate tourist destinations. Except for a desert, the region has everything.

Today India offers an estimated 3606 key protected monuments, 483 wild life sanctuaries, vast bounties of majestic mountains, beautiful beaches, proverbial hospitality which no other civilization can question. And yet we have failed to attract foreign tourists in bulk. Today we are also unable to convince the domestic tourists to consider the State of J & K with all its natural resources and heritage, as a destination for rest, recreation and or informal education.

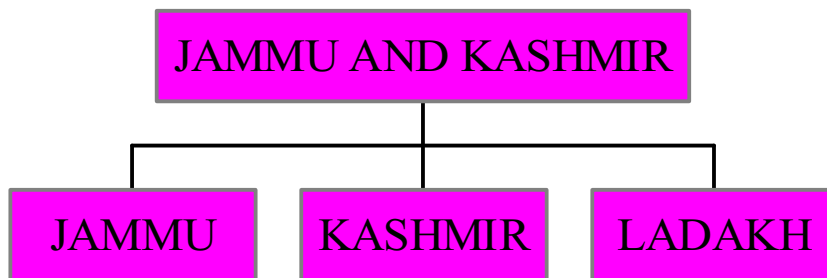
TOURISM IN JAMMU AND KASHMIR

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Tourism is one of the State's major industries. It has played an important role for developing the economy, particularly in the region of the Valley and Ladakh. The industry has given jobs to a very large number of people, particularly of the younger generation and generated economic activities in the primary, secondary and tertiary sectors in the State, which owes dependence to a large extent to this industry.

Three Distinct Regions

THE GOD'S GIFT



ATTRIBUTES

Some of the key attributes of the tourism industry in J&K are as follows :

- Virgin Areas
- Different Geographical Locations,
- Climate,
- Landscape,
- Architecture,
- Pilgrimage,
- Culture,
- Handicrafts,
- Hospitality,
- Historical Heritage, etc.

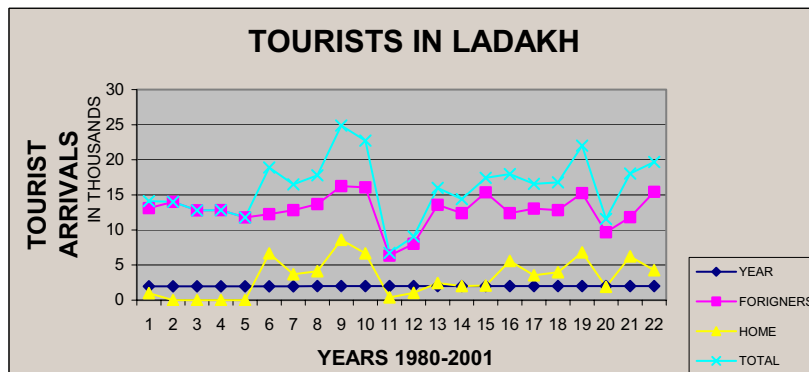
Jammu & Kashmir is full of colourful rocky mountains, valleys, trekking trail, several high rising chortens, snowy mountains, medows of flowers, lakes, garden and orchards, monuments and mandirs and forts and palaces, Ladakh is famous for its spectacular caves, monasteries, etc. while Jammu is famous for its temples/ religious tourism.

The region of Ladakh is the choice of foreign tourists; Jammu attracts pilgrim tourists, while the Valley attracts a larger number of domestic tourists and a fair sprinkling of foreign tourists. At the time of writing this report Ladakh had quiet a few tourists from Israel, Germany and France while in the Valley, a thin presence of tourists mostly from Italy and England were noticed. The foreign tourists season in Jammu regions has only transit passengers and not destined to any tourist spots in the area; therefore they do require current mention herein.

Trends in Tourist Arrivals

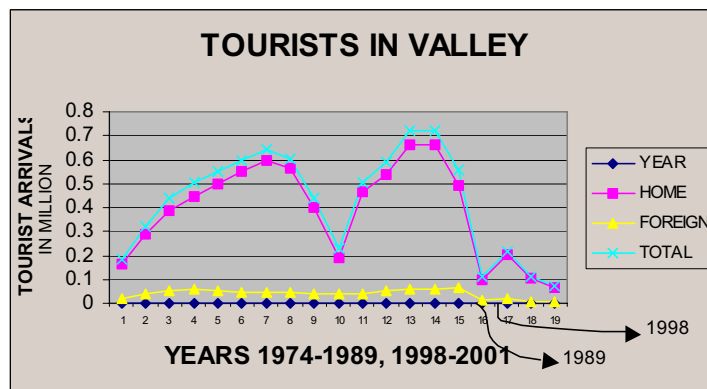
Over the years the tourist arrivals in various regions has been shown in the following figures:

FIGURE NO. 1



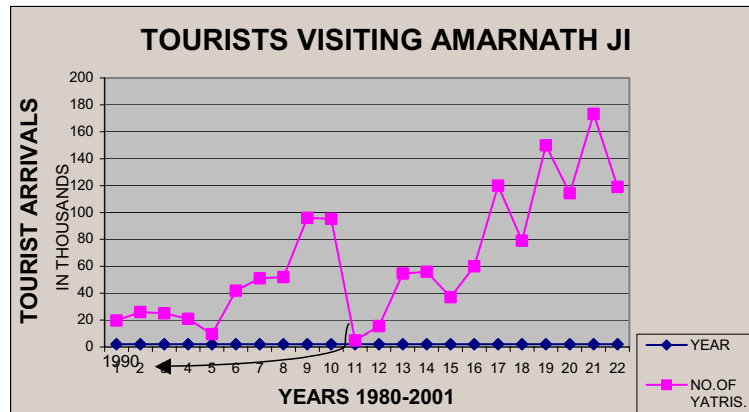
From Figure No. 1 we can see that there is a constant increase in the total (including foreign & domestic) tourist arrivals in Ladakh expect in few years when uncertain law and order was at its peak.

FIGURE NO. 2



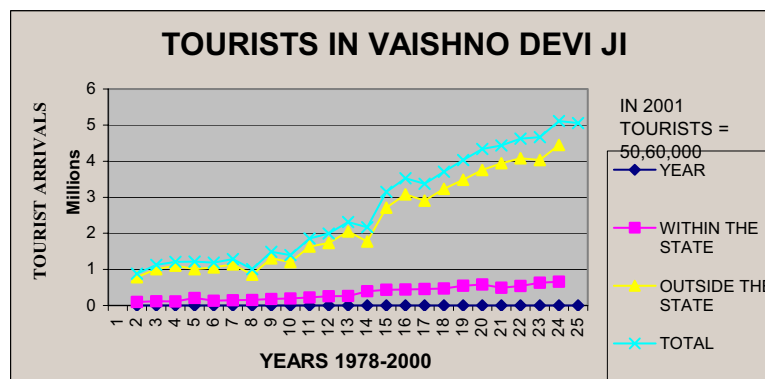
From Figure No. 2 we can see that there are two major dips in 1989 (when uncertain law and order was in the beginning phase) & in 1998 (when uncertain law and order was at peak phase) But the encouraging point is that there is growth after 1998 and would go further up if law and order situation improves.

FIGURE NO. 3



From Figure No. 3 we can see that there is continuous increase in tourists arrival after a major dip in 1990 and now the position is so that their are almost more than 1.2 lakh (ceiling on tourist arrivals has been imposed by the Government) people visiting Amarnath Ji.

FIGURE NO. 4



From Figure No. 4 we can see that there is continuous increase in tourists arrival (there in no major dip in 1990 as in Ladakh & Valley) and now the position is so that their are almost more than 50 lakh

tourists visiting Vaishno Devi Ji. But a significant point to note is that the total comprises of only domestic tourists/ pilgrimage tourists and insignificant foreign tourists.

Rise of Domestic Tourism in J&K

In spite of the fact that during the period of 1948 and 1950, Kashmir was in newspapers, this area did not interest the people of other part of the Sub-continent to visit. That is not until Shakti Samant released his film 'Kashmir Ki Kali' in 1956, which overnight brought the knowledge of the beautiful landscape and territory to the knowledge of the urban population of India, and the rush was on. In 1988 the Valley had been visited by a record number of over 722,000 lakhs tourists and if the percentage of annual rate had continued uninterrupted, the year of 2002 should have seen the Valley is being visited by 1.87 million people from other parts of the country. But because of uncertain law and order situation affecting the state, this ever increasing tourist traffic dramatically fell to an unbelievably low of 6600 tourists visiting the valley in the year 1993.

It is between these two statistical extremes, an effort has been made to work out a way through to develop a new plan of revival of tourism for the State & contemplate a scenario for the next 20 years.

TOURISM POLICY

First of all an appropriate Tourism Policy needs to be developed for the state to be able to attract more tourists both domestic as well as foreign. Tourism in the last five decades had provided good sustenance to the local population and revenue to the State exchequer. The consultants feel that besides the development of tourism activities in the Valley, it is necessary for the State to have those cottage and small scale industries which act as support services to the tourist industry such as agro industries and for which special efforts need to be made. That road is still to be charted out and has to be charted out fast otherwise the Tourism boom in India would be lost to the other states. The consultants now are attempting to provide a statement of a vision, statement of tourism goals, and a policy for the State Government, in the hope that using this as a base, the State Government may like to make a declaration of its tourism policy as it desires to follow for future. Please Refer the main report for the details of the Tourism Policy of the State of Jammu & Kashmir.

The SWOT analysis of the Tourism Industry in the state is as follows:

SWOT ANALYSIS FOR TOURISM IN J&K

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Rich Culture, Heritage • Three distinct Regions with diversity • Ladakh, Jammu, Kashmir • Flora, fauna, lakes, mountains, pilgrimage places, • springs, palaces, monuments, horticulture, • handicrafts, shawls, • Kashmir The Heaven, Switzerland of India/ Asia • Kashmiris are hospitable, hospitality in their nerves • Various kinds of tourism available to be exploited • Local People experienced due to past tourism booms • High Awareness of J&K as Tourist Paradise 	<ul style="list-style-type: none"> • No tourism Policy • Undeveloped Destinations • No proper/ Poor connectivity • Low awareness level • Low/ Poor promotional activities • Less Government Spending • Economy dependent on Tourism • Poor Coordination between departments • Stress only on few developed sites • Low time spending • No diversion of tourists from specific tourism to other type of tourism. • Less tourists diversion to new places • No Tourism research • No capacity building of stakeholders for better services • Lackadaisical Approach of Government • Complacency and non customer friendly. • No culture of Perspective Planning in State Department • No Accountability in Financial Matters & Services • Lack of Training Infrastructure & Hospitality Industry
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Can cater to almost all Tourist Tastes • High Returns from Tourism Industry • Development of Circuits • Un exploited Ladakh • Pilgrimage Circuits • Package Tours • Higher spending of people on recreation, entertainment • Linkage with specific circuits in other states • Professional approach • Governments role as Care taker and facilitator • Customer oriented and friendly 	<ul style="list-style-type: none"> • Security • Competition • Diversion of tourists to other safer places • Better facilities from competitors • Low information dissemination, access and training • Non awakening of Government, complacency • Non treatment of tourism as service industry

It is evident that the Strengths and Opportunities can out way the Weaknesses if properly exploited.

Tourist Growth Potential

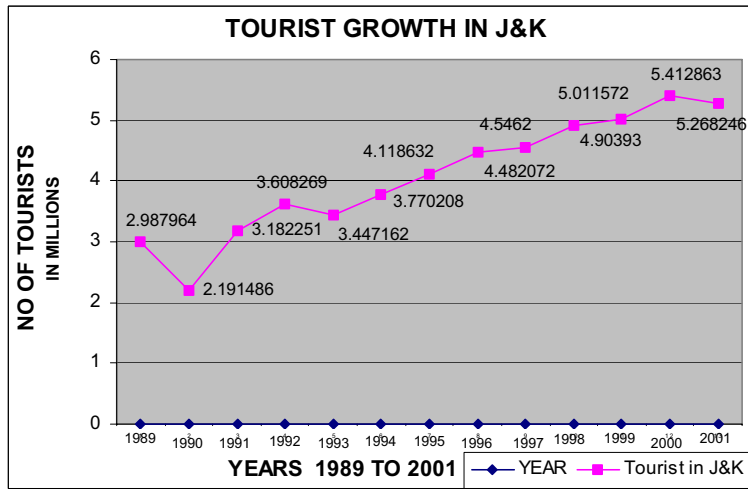
Almost a regular growth pattern can be seen in the tourists arrival in Jammu & Kashmir (Refer Table No. 1 & Figure No. 5). But this regular growth pattern is mostly because of the tourists coming to Vaishno devi ji. The tourists coming to Vaishnodevi ji are domestic tourists and the duration of their stay is limited from 2-3 days upto maximum of 5 days. There is limited diversion to other tourist places.

TOURISTS GROWTH IN JAMMU & KASHMIR

TABLE NO. 1

TOURISTS GROWTH JAMMU & KASHMIR	
YEAR	Tourist in J&K
1989	2987964
1990	2191486
1991	3182251
1992	3608269
1993	3447162
1994	3770208
1995	4118632
1996	4482072
1997	4546200
1998	4903930
1999	5013571
2000	5412863
2001	5268246

FIGURE NO. 5



Analysis of the breakup of the tourists in the last decade, shows that almost 90% to 95% of the tourist arrivals in Jammu & Kashmir is because of Vaishno devi shrine.

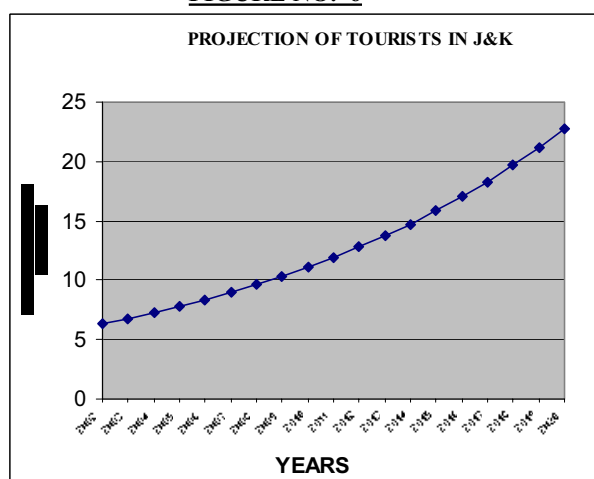
It is being projected that by the end of 2010 the tourists arrival in Jammu & Kashmir would be around 1,10,73,650, considering the fact that normalcy will occur in the next 2-3 years which will rise to 2,27,08,506 by the end of 2020.

PROJECTIONS FOR TOURIST IN J & K

TABLE NO. 2

YEARS	NO. OF TOURISTS
2002	6284029
2003	6743282
2004	7236634
2005	7766684
2006	8336228
2007	8948294
2008	9606150
2009	10313328
2010	11073650
2011	11891251
2012	12770613
2013	13716589
2014	14734445
2015	15829895
2016	17009148
2017	18278954
2018	19646661
2019	21120269
2020	22708506

FIGURE NO. 6



If every thing goes normal and the militancy in the state is controlled in 2-3 years time, we foresee a growth of Tourism and the number of tourists soaring to above 20 million, enough to give a kick start to the economy of J&K and bringing it back on track.

INFRASTRUCTURE DEVELOPMENT

To handle such a traffic flow, the development of infrastructure has to match these projections. The infrastructure requirement in terms of accommodation, transport, etc. is as given below: (For Details please refer Chapter- VIII.)

TABLE NO. 3

PROJECTIONS OF INFRASTRUCTURE DEVELOPMENT/ REQUIREMENT

HOTELS

	2005		2010		2015		2020	
	Hotels	Bed	Hotels	Bed	Hotels	Bed	Hotels	Bed
TOTAL	670	30333	1028	43039	1715	63653	3018	97600

GUEST HOUSES

	2005		2010		2015		2020	
	Hotels	Bed	Hotels	Bed	Hotels	Bed	Hotels	Bed
TOTAL	530	16438	896	58052	1607	40108	3023	65663

TRANSPORT

Type of transport Infrastructure	2005	2010	2015	2020
Buses	20179	27659	38178	60462
Taxis	8576	11755	16226	25697

To cater to the tourist inflow apart from infrastructure, the development of the sites and tourist places in the state is also essential. The development of towns and enhancing the available facilities is also an essential part of the Perspective Plan. The tourists are attracted to the destinations not only because of the natural resources or natural beauty of the place, but also because of the returns they get on the expenditure they do in the tourist place. These could be satisfaction of psychological needs like proper, safe, hassle free and affordable accommodation, good transport facilities, in and around the tourist place, good water, hygiene and sanitation facilities. The others could be related to the attributes of the destination or the tourist place in terms of various sites to visit in and around the tourist place. Some other could be satisfying his personal tastes like museums, temples, gardens, heritage sites, etc. Or further these could which brings in excitement and learning like adventure sports, music, cultural shows, etc. The tourists also come to tourist's places to buy the traditional things like handicrafts, jewelry, etc. **In a nutshell the tourist destination should have all the things where the tourist can spend their time and money in a satisfying and justifiable manner.**

There are thousands of tourist places from which the potential tourist has to choose his destination. So the destination has to be world class if the foreign tourist are being targeted and also from this point of view the facilities should be better and comparable to other best of the places in India.

VIABLE TOURISM PROJECTS

In addition to the various projects recommended an integrated approach has to be made in terms of back end support and forward end support to the Tourism activities. The activities, which are directly or indirectly related to tourism, have to be given utmost importance to make J&K the most attractive state in the country and in the world for domestic as well as foreign tourists. Many new initiatives or projects which should be undertaken in the in the next 20 years are being recommended, of course with the recommendation that, the ongoing projects should be completed as soon as possible. The brief details of the projects have been provided in the Chapter XIV- A- Financial Implications. Chapter XIII- Recommendations, gives the details of investments and action plan for the development of Tourism in the next 20 years. Some of the projects are: Expansion of Srinagar airport, State airline service (19 routes), Helicopter taxi service, **Developing the Srinagar Airport as an international hub of air traffic (connecting and attracting tourists from gulf countries)**, Short rail track in Kargill (Zanskar Valley) – between Mulbakh, Kargil and Sanku, Modules for short stay in remote areas, Traffic training schools/ Parks (Leh, Srinagar, Barammullah, Anantnag, Jammu, Udhampur, Rajouri and Katra), Designated centres to be called JK World Tourism Bureaus in Israel, Iran, Italy Austria, England Germany & South Korea, Upgrade the existing tourist facilities at Lama Yaru monastery (petrol pump and parking facility for 20 cars and 20 HTVs/buses), De-congestion of the old

Anantnag, Development of Ethnological Museums in Udhampur, Poonch, Kathua, Riasi, Anantnag, Barammullah, Ladakh, Aquariums in Srinagar, Pahalgam, Leh, Barammullah, Gandarbal, Sophian, Hemis, etc., Developing Power Potential in Hydel Schemes, Opening of Traffic Training Parks, Formation of State Transport Board, Tourist Complex, Redevelopment of Mughal Gardens at Achabal, Rajouri & Parimahal, etc.

INVESTMENTS

For all these projects investments are required both from the Central Government and the State Government and also the Private Parties. The phase wise investments have been shown in the following Table No. 4.

TABLE NO. 4
TOTAL INVESTMENTS

Period	Total Proposed Outlay	Phase wise Expenditure (Rs. In crores)				State Share (Rs. In crores)	Central Share (Rs. In crores)	Employment Generation (to individuals)
		2003-2008	2008-2013	2013-2018	2018-2023			
2003-2023	(Rs. In crores)							
20 Years	130039.1	20801.85	46691.25	37239	25307	27661.9	102377.2	108870

The investments would generate direct employment of 108870 due to execution of these projects. The breakup of the investments with respect to Basic Tourist Infrastructure, Development of Tourism Products, H.R.D., Promotion and Marketing are as given below in the following Table No. 5.

TABLE NO. 5
BREAK UP OF TOTAL INVESTMENTS

Year Wise	Total Investment	Total Investment- Basic Tourist Infrastructure	Total Investment- Tourism Products Services	Total Investment- Human Resource Development	Total Investment- Promotion & Marketing
2003-2008	20801.85	12481.11	3120.28	2080.19	3120.28
2008-2013	46691.25	28014.75	7003.69	4669.13	7003.69
2013-2018	37239.00	22343.40	5585.85	3723.90	5585.85
2018-2023	25307.00	15184.20	3796.05	2530.70	3796.05
	130039.10	78023.46	19505.87	13003.91	19505.87

Economic Benefits

Tourism industry has played an important role in the development of the economy of the state as a whole. The economic activities are generated in the primary, secondary and tertiary sector of the valley. Hence tourism generated employment may be classified in to three major heads one is direct employment that sell goods and services directly e.g. hotels, restaurants, shops etc. Second one is indirect employment, which generally supplies goods, services to the tourism business and thirdly investment related employment in construction and other capital goods industries. Total Employment Generation would be 34.062 lakhs till 2020 for a tourist inflow of 227.08 lakhs.

TABLE NO. 6
Generation of Employment
on
Implementation of Tourism Development Plan

Year	Additional Tourist Inflow (In lakhs)	Direct Employment (in lakhs)	In-Direct Employment (In lakhs)	Total employment col. (2)+(3)
1	2	3	4	5
2002	62.83	1.57075	7.85375	9.4245
2003	67.43	1.68575	8.42875	10.1145
2004	72.36	1.809	9.045	10.854
2005	77.66	1.9415	9.7075	11.649
2006	83.36	2.084	10.42	12.504
2007	89.48	2.237	11.185	13.422
2008	96.06	2.4015	12.0075	14.409
2009	103.13	2.57825	12.89125	15.4695
2010	110.73	2.76825	13.84125	16.6095
2011	118.91	2.97275	14.86375	17.8365
2012	127.7	3.1925	15.9625	19.155
2013	137.16	3.429	17.145	20.574
2014	147.34	3.6835	18.4175	22.101
2015	158.29	3.95725	19.78625	23.7435
2016	170.09	4.25225	21.26125	25.5135
2017	182.78	4.5695	22.8475	27.417
2018	196.46	4.9115	24.5575	29.469
2019	211.2	5.28	26.4	31.68
2020	227.08	5.677	28.385	34.062

COST BENEFIT RATIO

The cost benefit ration is based on the assumption of total benefit (both direct and indirect) from additional arrival in next 20 years and dividing it with total expenditure proposed to be occurring in

next 20 years in various activities i.e. infrastructure creation and maintenance, providing social services etc. (Refer Table No. 7). The expenditure is divided in to different phases i.e. 2003-08, 2008-2013, 2013-2018 and 2018-2020 likewise the direct benefit is also divided in to similar phases, the benefit cost ratio reflects the high return on the proposed Tourism Investment Plan (Refer Table no. 8).

TABLE NO. 7
Total Benefit From Additional Tourist Arrivals on the Implementation of
Tourism Development Plan

Year	Total direct benefit (Rs. In crore)	Total in direct benefit (Rs. In crore)	Total Benefit [Col. (2)+(3)] (Rs. In crore)
1	2	3	4
2002	1752.21	1996.96	3749.17
2003	1886.16	2149.62	4035.78
2004	2031.51	2315.29	4346.80
2005	2189.42	2495.26	4684.68
2006	2361.15	2690.98	5052.13
2007	2548.15	2904.10	5452.25
2008	2752.04	3136.46	5888.50
2009	2974.62	3390.15	6364.77
2010	3217.95	3667.47	6885.42
2011	3484.37	3971.09	7455.46
2012	3776.49	4304.02	8080.51
2013	4097.32	4669.68	8767.00
2014	4450.26	5071.91	9522.17
2015	4839.18	5515.16	10354.34
2016	5268.50	6004.45	11272.96
2017	5743.28	6545.56	12288.84
2018	6269.31	7145.08	13414.39
2019	6853.23	7810.56	14663.79
2020	7502.64	8550.70	16053.34

TABLE NO. 8
Phase wise Cost Benefit Analysis of Jammu Kashmir Perspective Plan

Year	Total Benefit (Direct and Indirect)	Phase wise Expenditure	Net Benefit (Rs. In crore)
2003-08	29460.18	20801.85	8658.33
2008-2013	37553.18	46691.25	-9138.51
2013-2018	56852.70	37239.00	19613.70
2018-2020	30717.13	10122.8	20594.33
2020-2023	-	15184.2	-
Total	154583.19	130039.1	39727.85

The above Table shows that for an expenditure of Rs. 114854.9 crores till 2020 the net benefit that will accrue over the years till 2020 would be Rs. 39727.85 crores.

MARKETING & PROMOTION OF TOURISM

Successful marketing strategies require a detailed appreciation of the product or products on offer; accurate identification of markets; an appraisal of the most efficient and effective means of communication with those markets; and knowledge of the media (including the *E* sector), mechanisms and dynamic relationships which provide the vehicles for communication. Product, market and communication are the three defining points of what we term the *marketing triangle*, and only when these elements are in complete balance can the best results be realised. The ability to manage complex interrelationships requires more than a passing acquaintance with marketing theory.

The basic aim of the marketing strategy for tourism is to ensure maximum effectiveness of promotional activity in order to strengthen and enhance J&K's position as an international tourist destination.

Product Marketing

Product marketing can be considered as an integral part of tourism marketing, it is the classification of customers according to the degree that specific types of services could appeal to them.

TABLE NO. 9

Products of Tourism Marketing

<ul style="list-style-type: none"> • Urban stays (summers) • Urban stays (winter) • City experiences • Sights and scenery tours • Theme tours • Pilgrimage tourism • Buddhist circuits tourism • Lakes Circuit fro Tourism • Wild Life / Sanctuaries Circuit Tourism • Muslim Pilgrimage Circuits 	<ul style="list-style-type: none"> • Resort stays • Health tourism • Golf • Downhill skiing • Snowmobiling • Cross-country skiing 	<ul style="list-style-type: none"> • Fishing • Outdoor adventure • International cruises • Corporate meetings • Conventions • Incentive travel • Adventure Tourism • Mountaineering
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Some of the Major attraction for the tourists in J&K, which needs to be exploited to full potential, are:

Adventure & Holiday Tourism

- ✚ Mountaineering
- ✚ Trekking
- ✚ Ballooning
- ✚ Rock Climbing
- ✚ White Water Rafting
- ✚ Motor Rallies

Pilgrimage Tourism

Pilgrimage Tourism is expected to generate a high growth rate of tourism in Jammu and Kashmir. Domestic Tourism is largely a part of Pilgrimage Tourism, but it has to be converted / extended/ turned into other forms of Tourism like Wildlife Tourism, Adventure Tourism, Leisure Tourism, by providing exiting offers to the tourists, etc.

- ✚ Buddhist Circuit- Ladakh
- ✚ Vaishnodevi Ji, Amarnath Yatra, etc.

Eco-Tourism

Eco-Tourism is Responsible travel to natural areas and provides sustenance to the well being of the local people. It is an amalgamation of interests arising out of environmental, economic and social Concerns. The stakeholders/ involved are consumers, managers, native people & suppliers, etc. Eco-Tourism could be initiated in :

- ✚ Sanctuaries
- ✚ Mountaineering
- ✚ Biking, etc.

Potential Places to be harnessed are:

- Pilgrimage Tourism :** Gaurikund , Sudhmahadev, Mantalai
- Pilgrimage:** Katra, Shiv Khori, Charaina Devta, Dera Baba Banda.
- Recreation Tourism:** Agar Jito, Reasi Fort, Salal Dam, Symbal
Choya, Dhayan Garh, Agni Nalla, Kanthan. Sanasar , Patnitop
- Leisure Tourism :** Sanasar , Patnitop, Kud
- Adventure Tourism :** Sanasar , Patnitop

Rural Tourism

Rural Tourism is one component of a broader initiative to improve the economic & social life of the local people & to enhance the environment. Following a description of both the process involved in developing the programme and the tourist product itself, significant features of rural tourism's approach are crucial to long-term success and sustainability.

Strategies for Marketing J&K

A multi pronged strategies have to be undertaken to market the brand J&K in the global as well as national arena. Sustained efforts have to be made to increase J&Ks visibility and awareness. Marketing has to be done in such a way so as to attract the best of the various segments of tourists having different tastes of recreation, entertainment, adventure, etc.

FIVE STRATEGIES TO INCREASE J&K's VISIBILITY ON THE WORLD TOURISM MAP

1 Development and organization of a tourism product in keeping with customer expectations

Faced with escalating competition and the need to satisfy customers with an increasingly broad range of interests, J&K has no option but to offer a tourism product that is competitive and innovative. Both the development and the organization of the tourism product are instrumental in the success of promotional strategies.

2 Adjusting promotional strategies to new information and communications technologies

There is a great upheaval in the world of communications, prompting major changes in consumer behaviour, especially noticeable in travel planning and reservations. J&K will have to adopt a promotional approach consistent with these new tendencies.

3 Emphasis on markets offering the best return on investment

Although deemed satisfactory, J&Ks performance could improve on some international markets offering development prospects. Such is the case of the American market (except for New England) and several European markets. J&K should focus investments on markets generating the most revenue.

4 Establishing a strong business relationship between Tourism department of J&K and the tourism industry in J&K.

In light of the growing number of players showing heightened interest in tourism, current promotional investment is now spread too thinly. Partners must be grouped together to increase the impact of J&K's tourism industry on foreign markets.

5 La connaissance des clientèles et l'évaluation des résultats

Setting up a customized tourism product for constantly evolving and increasingly discriminating clientèles and the success of promotional strategies depend on two things:

- ✓ Improving our knowledge of client needs and interests;
- ✓ Rigorously assessing the results obtained.

Promotion

Re-thinking the advertising strategy to reach a global market. In the face of changing times and new realities, the tourism operators should reassess their marketing strategies.

A New Media Action Plan is needed that will increase the marketing reach and lower the costs.

- ✓ Printed Materials
- ✓ Magazine Advertising
- ✓ Trade Shows
- ✓ TV & Video

Targeting

Targeting is one of most important marketing mix of the marketing Strategy. The right kind of tourist has to be targeted who can generate revenues for the tourism industry.

Strategy for tourism Promotion

- i) Development of facilities, activities, physical environment and infrastructure
- ii) Marketing the region and selling an image
- iii) Expansion of culture, sport, natural and other tourist attraction
- iv) Physical regeneration of the area
- v) Expansion of tourism resources comprising primary and secondary elements

ENVIRONMENTAL IMPACT

The development of Tourist destination is though beneficial in many ways but it has a flip side also and that is its impact on the environment. In many developing countries, the costs of environmental degradation have been estimated at 4 to 8 percent of GDP annually. Natural resources degradation – depleted soils, insufficient water, rapidly disappearing forests, collapsed fisheries – threaten the quality of life of millions; an estimated 6 million people die annually, and many more get sick, in developing countries from water-related diseases, indoor air pollution, urban air pollution, and exposure to toxic chemicals. Environmental degradation also increases the vulnerability of people to natural disasters. The impact of environmental degradation threatens the basis for growth and livelihoods today and in the future. Environmental degradation also reaches across borders, affecting the quality of the regional and global commons. The Environment Strategy has to respond to these challenges.

Strategic Objectives of Environment Strategy could be:

- Improving the quality of Life
Enhancing Livelihoods. Protect the long-term productivity and resilience of natural resources and ecosystems on which people's livelihoods depend.
- Improving the quality of growth

Promote better policy, regulatory, and institutional framework for sustainable environmental management; help improve safeguard systems and practices; and promote environmentally and socially sustainable private sector development. The private sector is becoming a major player in many areas previously controlled by the public sector. It should be ensured that the private sector becomes a driving force in sustainable development.

- Improving the Regional and Global Commons

Environmental initiatives could be build on these principles:

- ✓ Focus on the positive linkages between poverty reduction and environmental protection.
- ✓ Focus first on local environmental benefits, and build on overlaps with global benefits.
- ✓ Address the vulnerability and adaptation needs of regions/ developing countries.
- ✓ Facilitate transfer of funds to meet the costs of generating global environmental benefits.

- Reducing health risks.
- Reducing vulnerability to natural hazards.
- A ‘tourist code of conduct’ for this region should be evolved, which could be applicable to both the tourist industry and consumers alike. All should strictly adhere to the provisions of code.

Schemes and incentives to be provided by State Government to the Private Sector

The land areas may be earmarked in the state on the basis of their current status of development. Developed land areas should not be offered to the private sector. In the under developed areas incentives should be offered on the basis of their remoteness from main land / centres. For very remote areas the private sector may be leased land on token charge. The lease should be for 15 years and would be subject to review depending on the developmental activity undertaken. In less remote areas and still underdeveloped areas a lease rate may be determined and offered to the private sector. No lease shall be more than 15 years duration. Water may be offered in bulk at a predetermined rate, which will not be changed for a period of 5 years from the year of commencement of notified activities of the individual members in private sector. Spring water will not be used for commercial or industrial activity. Power – Private entrepreneurs will be allowed to maintain a captive generating plant not exceeding 125 KVA. The SEB should create guidelines for the installation and maintenance of the private captive generating plants. Sales Tax holiday for goods being sold within the state for 5 years should be provided. Luxury and entertainment tax : In the hospitality industry it should be maximum of 5% of total tariff above 800/- per day and for entertainment trade the tax tariff, 15% for live entertainment, 35% for cinema shows. Tax holiday should be provided for 3 yrs for Cineplex and new cinema halls constructed.

MAIN REPORT

OBJECTIVES OF THE STUDY & SCOPE OF WORK

As per the Ministry of Tourism, Government of India, the key objectives of this study & scope of work is as follows :

- i) A perspective plan with a time frame of 20 years needs to be developed for developing sustainable tourism giving year-wise phasing of investment having regard to the resources available.
- ii) The Plan should indicate short-term and long-term plans, targets and ground realities.
- iii) The Plan should indicate all activities to be undertaken by different agencies clearly indicating the time frame for each activity.
- iv) The Plan should be able to assess the existing tourism scenario in the State/Union Territory with respect to existing traffic levels and inventory of :
 - natural resources
 - heritage and other socio-cultural assets.
 - quantitative/demographic factors like population, employment, occupation, income levels etc.
 - services and infrastructure already available.
- v) The Plan should review the status of existing development/investment plans of schemes for the development of tourism in the region.
- vi) The Plan should list and evaluate existing potential tourist destinations and centers and categories them on the basis of inventory of attractions, infrastructure availability, degree of popularity, volume of traffic flow etc.
- vii) The Plan should analyse and categorise existing/ potential destinations and centres, as a stand alone destination, part of a circuit and/or as major attractions for special interests groups , etc.
- viii) The Plan should assess the existing infrastructure levels at identified destinations/centre in terms of quantity of roads/transportation facilities, civic amenities, enroute transit facilities, boarding and lodging facilities etc.
- ix) The Plan should be able to broadly assess traffic flow to identified destinations & centres for assessment of infrastructure requirements taking into account past growth trends, suggested linkages and integration, future expected developments including likely investments by the State and investment climate/incentive for the private sector, etc.
- x) The Plan should attempt and arrive at an indicative cost configuration of likely investment on infrastructure development under different heads and to prioritize investment needs by drawing up a phased investment plan covering the next 20 years.
- xi) The Plan should identify the existing as well as new tourism projects including projects for expansion/augmentation, upgradation of facilities and services destinations & centres which have potential for development.

- xii) The Plan should undertake product conceptualization cum feasibility exercise inter-alia for identified projects covering aspects like locational evaluation, schematic product planning & conceptualization including quantification of individual project parameters, assessment of overall investment levels and of project viability cum feasibility study exercises etc.
- xiii) The Plan should prepare an action plan for implementation of identified potential development schemes / projects/ products and for development of infrastructure in conformity with the policy objectives & guidelines provided by the concerned state/central agencies/departments and the requirements of national development and funding agencies. The overall development plan to also take into account WTO's Bali declaration on tourism development.
- xiv) The Plan should include Project-wise potential for employment generation; a reasonable percentage of potential employment is to be reserved for women
- xv) The Plan should indicate the actual and the projected number of domestic and foreign tourist arrivals for each proposed tourist place.
- xvi) Priorities the scheme of the basis of employment potential of the project and the tourist arrivals at the proposed place.
- xvii) An inventory of existing infrastructural facilities (including paying guest facility) is to be made; after which, the proposed infrastructure needs to be split up into various segments concerning different State Government Departments, such as PWD, Forest, Culture, Handicrafts etc., and dovetailed with the Tourism Plans.
- xviii) Since the perspective plan would be used for external assistance, it would be desirable to suggest State tourism projects to foreign funding agencies for financial assistance; each project has to be properly scrutinized and finalized accordingly.
- xix) Other sources of funding such as loans from the Financial Institutions, the Tourism Finance Corporation of India (TFCI) etc., need to be explored. Besides, proper incentives need to be suggested for private sector participation.
- xx) Further the available institutional machinery in the State to oversee/Coordinate the development or tourism infrastructure has to be specifically suggested.
- xxi) Facilities for performance by local artists; cultural troupes should be built into the perspective plan.
- xxii) Cultural complexes can be suggested with the financial help from the State Department of Culture and later made economically viable on pattern of Dilli Haat.
- xxiii) Handicraft shops should be suggested at various tourist places; these could be run by women.
- xxiv) Perspective plan should include potential developing health resorts at/near the tourist places. Yoga classes, nature cure facilities, ayurvedic system of medicines should be available at these places to attract tourists.
- xxv) Consultant preparing the perspective plan should be asked to give an executive summary of the plan along with the report.
- xxvi) The perspective plans should incorporate attractive packages/schemes to attract private sector investment.

- xxvii) It is necessary that the environmental issues are dealt with in sufficient details and environmental impact assessment studies made in respect of all new projects.
- xxviii) The perspective plans should include carrying capacity studies, instruments of spatial and land use planning, instruments of architectural controls for restoration of old properties and construction of new ones in old towns and cities, strategy for local community participation and protection of cultural identity, awareness programs for local participation and commitment to the project.
- xxi) Measures necessary for mitigating the adverse environmental impacts and rehabilitating the tourist places already environmentally damaged should be incorporated in the perspective plans.
- xxx) The perspective plan, should include strategy for privatization of the tourism related properties owned by the State and the State Tourism Corporations.

METHODOLOGY AND SURVEY DESIGN

The State of Jammu and Kashmir has already been declared a 'disturbed area' since long and has been living amidst various crises. The security environment is tense and difficult due to militancy and there is an absolute sense of uncertainty about its future. The present Chief Minister however has unbounded optimism for the future of Jammu & Kashmir, as do the people who were met amongst the public, even though this is not shared by the officials at various levels in his own administration. So the Consultants have to formulate the Plan in such divergent scenario and divergent views of the administration, political will and the public at large.

APPROACH FOR FORMULATION OF PERSPECTIVE PLAN

Background for formulating the Plan

Our approach in making the perspective plan for development of tourism industry in Jammu and Kashmir incorporates the core concept, which may not be original but is nonetheless extremely relevant, that tourism can be properly and effectively developed only through an integrated approach wherein the required supplementary, complementary and other support services are provided in coordination but they also function efficiently with scope for growth and expansion.

During the field visits, when project proposals to various concerned departments were suggested, the consultants found that each of them were working in very narrow compartments with no apparent systems in place to coordinate and integrate their activities for their own as well as the overall development of tourism in the state. Momentum and enthusiasm varied from department to department. The consultants encountered this lack of enthusiasm at every avenue picked for examination, analysis and suggestion of project proposals.

Some of the problems observed / encountered are generic to the entire country and some are specific to the state of J & K. Tourism potential of the country as a whole is immense, from both domestic as well as the international travelers. However, this potential has not been fully tapped because of inadequate infrastructure of airports, roads, communication and transportation, inadequate / ineffective promotion and advertising, lack of easily accessible and inadequate tourist information, unfriendly / dishonest nature of the people who interface directly with the tourists like taxi drivers, shopkeepers, touts etc. as compared to other competing international tourist destinations worldwide, especially in the S.E. Asian Region. The Central Government and few of the States / UTs have started taking some initiatives in addressing these problems but still a lot needs to be done and also speedily so as to make a dent in the International Tourist Market as a much favoured destination and for increasing the numbers of domestic tourists. The problem specific to the state of Jammu and Kashmir is that of militancy and its consequential impact on all the tourism related activities.

The Consultants have formulated the 20 Year Perspective Tourism Plan for the State of Jammu & Kashmir with this backdrop.

Assumptions for the Perspective Planning

A close reading of our report will show that while we have discussed the data collected in our ground surveys during the period of our visit in the state, we have relied upon the data collected before 1989 available in government records. We have made mention of the fact that we anticipate an immediate surge of tourist traffic within 3 years from now to see the same volume of tourism recorded in the state as achieved in 1989. We find most of the departments in the state government not bothered to go back into planning their future strategies using the data available in the period 1987-89. The situation is quite unique for the state because governance of the people was extremely difficult and all information collected in government records as well as collected by field surveys by consultants was unrealistic for the interim period and the only base which could be held as reliable statistics were those on record for the pre-1989 period.

Our inferences in the report are therefore depending wholly on the data which is pre-1989 and we are not accepting for our studies information which has been offered to include the period of the last decade of the 20th century.

Phasial Approach for the Perspective Planning

In order to have a practical approach so as to facilitate decision making the consultants have split up various issues to be addressed into time frame of 5, 10 and 20 years as regards implementation. The plan envisages the revival of administration and its existing infrastructure within a time frame of initial 5 year period. It further envisages launching of certain practical and acceptable proposals in the first 10 years which will go towards promoting sustainable development of the tourism industry in the state. And finally it envisages initiation and implementation of innovative projects having a long gestation period and which are capital intensive, in a time frame of 20 years. However, these would require further fine tuning by the state government after getting inputs from the related agencies / departments / organisations. Needless to say, Tourism is the lifeline of Jammu & Kashmir and all possible efforts need to be undertaken for retaining, maintaining and sustaining it. The approach in the 20 year perspective, plans on sustainable tourism, not a fly by night tourism, therefore necessarily the approach has been regional and not narrowly focused.

The basic methodology of this study was to collect secondary as well as primary data from various stakeholders & sources. This was amalgamated and superimposed with the first hand information of our experts, (which they accumulated during their field visits to all the three distinct regions), to formulate the Perspective Tourism Plan.

In the assigned scope of work, exclusive detailed information was sought in a myriad of proposal upon evaluation by the Consultants. A very large number of considered proposals envisaged have to be dropped for the simple reason that there was no official information available for access on the current state of tourism locally. Creating a new data base on proposals under consideration entailed a long time duration and the deadlines in this project kept for the consultants, forced these promising proposals to out of their consideration. The reader must realise that the local administration has been in a state of

crises for nearly two decades and denied itself the luxury of compiling primary and secondary data on various parameters of public administration in the manner they are fashionable or currency in the better administered parts of the country. The proposals of the perspective plan thus suffer from detailed examination of existing infrastructure which in most cases is in disuse or misused for requirements of security forces, lack of feasibility studies due to absence of primary data, and potential parameters because some location have not been opened to civilisation access at all in the past. The situation in J&K should not be read with any other state of the Union, as the region has unique problems of public administration and require a more compassionate and compromising approach. This may remain as a policy until a more enlightened society evolves on ground, which would value good work and honour the practices of accountability.

The State of J & K has three distinct regions, viz. Jammu, Kashmir and Ladakh and all three have immense potential for tourism from both domestic as well as international tourists. There are number of locations which are untapped and can be developed as major tourist destinations, having all the natural as well as the cultural resources for attracting tourists. Some of the important natural resources are excellent climate, beautiful lakes, locations for adventure sports, wild life, trout fish, natural and manmade parks like Shalimar and Nishat of the Mughal period, flora and fauna, alpine forests, natural waterfalls and streams etc. As for the cultural resources, the state has some of the most important religious shrines of Hindus, historical monuments, plethora of local festivals, distinct cuisine, craftsmanship skills for intricate and fine woodwork, woolens, carpets, textiles, paper mache, inlay work etc.

These locations can also be developed as a tourist circuit in the pattern of the golden triangle of Delhi-Agra-Jaipur.

Keeping this scenario in mind our team adopted multipronged approach for conducting the study and has covered all the three distinct regions of Jammu, Kashmir and Ladakh.

SURVEY DESIGN

Survey design for conducting the survey has been made keeping in view the 3 distinct regions of J&K and the various stakeholders in the tourism industry in J&K.

Universe of the Study

Universe of the Study would be the whole state of Jammu & Kashmir.

Sampling Plan

Selection of Regions

Jammu & Kashmir consists of three regions, all three being distinct geographically and culturally and all three regions attracting tourists because of their unique special features. Hence all the three regions, viz. Jammu, Kashmir and Ladakh, were selected for undertaking the survey.

Sampling Frame

Sampling frame constituted all the districts of J&K and the various stakeholders, directly or indirectly associated with the Tourism industry in Jammu & Kashmir.

Data Collection

Both Primary as well as secondary data has been collected from various stakeholders.

Desk Research

Our team studied available published material and held internal discussions to familiarise themselves with the present tourism scenario in Jammu & Kashmir, within the country and in the world. Then they proceeded for Primary Data Collection.

Primary Data Collection

Various Tools used for primary data collection are:

- * Questionnaire / Schedules
- * Postal Survey
- * Interviews / Discussions
- * Focus Group Discussions

Sources of Primary Data Collection

The Primary data has been collected from the following stakeholders in the tourism set-up :-

- i) Officials / Staff of hotels and other boarding and lodging facilities
- ii) Visiting tourists in the vicinity

- iii) Prospective tourists
- iv) Local inhabitants
- v) Artisans, Craftsmen
- vi) Other related agencies and persons

To identify and understand the Problems and Constraints being faced by the people involved directly or indirectly with the tourism industry and obtaining their Suggestions for solving / overcoming them, discussions were held with following :-

- Minister of Tourism, Govt. of J&K
- Secretary, Directorate of Tourism, Govt. of J&K
- Officials at various levels of the Directorate of Tourism, Govt. of J&K.
- Officials of all other Departments related to Tourism, Govt. of J&K.
- Officials of all other departments providing supporting infrastructure for Tourism, Govt. of J&K.
- Kashmir Hotel and Restaurant Association.
- Travel Agents Society of Kashmir.
- House Boat Owners Association.
- Kashmir Taxi Operators Association.
- Shikara Workers Union.

Focus Group Discussions were held to identify and understand the problems hampering the development of tourism and obtaining an insight into the existing state of affairs of the tourism industry in J & K and to collect suggestions with the following stake holders :-

- Travel agents
- Hoteliers
- Taxi operators
- Shikara workers
- Houseboat owners
- Officials of Directorate of Tourism, J&K
- Officials of JKTDC
- Officials of Department of Archaeology
- Officials of Department of Gardens and Parks
- Officials of Lakes and Waterways Development Authority

Interviews were held on a sample basis with the following stakeholders using structured questionnaire / schedule :-

- Tourists both domestic and foreign
- Hoteliers / Restaurant Owners / Houseboat Owners / Hut Owners
- Local Inhabitants / Shopkeepers / Tourist Guides
- Travel Agents / Tour Operators, etc.

Places visited for Data Collection

Kashmir Valley

- Srinagar
- Suburbs of Srinagar
- Airport
- Verinag
- Anant Nag
- Gulmarg
- Dal Lake
- Convetion Centre
- AwantiPur
- Hazrathbal
- Nagin Lake
- Wular Lake
- Sopore
- Shankaracharaya Temple
- Hari Parvat
- Pandrethan
- Shalimar Garden
- Nishat Garden
- Sonmarg
- Kistwar
- Daksum
- Bhadarwah
- Pahalgam, etc.

Ladakh

- Leh
- Panggong Lake
- Chusul Lake
- Stokes Palace
- Hemis Monastery
- Amchi Monastery
- Khaltse Monastery
- Thoise
- Shey Monastery
- Lama Yuru
- Henely Observatory
- Loma
- Attended Ladakh Festival
- Kargil
- Mulbek
- Baltic
- Nyoma
- Drass, etc.

Jammu

- Jammu Town
- Jammu Suburbs
- Kishtwar
- Doda
- Katra/ Vaishnodevi
- Aknoor
- Rajouri
- Poonch
- Kupwara
- Dul, etc.

Indicators of Data Collection

As mentioned earlier, both Primary and Secondary data for the state of J & K has been collected mainly pertaining to the following :-

- * Background of tourism in J&K
- * Demographic Data
- * SWOT analysis from tourism perspective
- * Tourist arrivals / data for last 10-20 yrs
- * Type of tourists visiting
- * Requirements and expectations of tourists
- * Problems and suggestions of tourists, both prospective and visiting
- * Problems and suggestions of local inhabitants
- * Nature, type, number and quality of boarding and lodging facilities
- * Infrastructural facilities
- * Recreational and Entertainment facilities
- * Sporting facilities
- * Existing development plans / schemes for tourism
- * Incentives for private sector participation in tourism
- * Potential of employment generation and economic development
- * List of Travel Trade Organizations
- * Government plans for tourism related infrastructure development
- * Plans of Department of Handicrafts
- * List of existing tourist spots / locations
- * List of potential tourist spots / locations
- * Tourist accommodation facilities with different govt. departments
- * List of tour/travel agent of J&K

- * Tourism department plans
- * Plans of departments directly connected with tourism development such as Wild Life, Fisheries, Forestry, Culture, etc.
- * Funding agencies for development of tourism, both in the state as well as outside the state
- * Scope of cultural complexes, information centres, etc.
- * Scope of health resorts, etc.
- * Facilities/ Properties identified by tourism department for disinvestments, etc.

Secondary Data Collection

The secondary data has been collected from various sources / departments. The data has been collected after due consultations, discussions and visits to these departments, which are: -

- . Directorate of Tourism, Govt. of J & K
- . JKTDC, Govt. of J & K
- . J&K Pollution Control Board, Govt. of J & K
- . Directorate of Youth Services and Sports, Govt. of J & K
- . J & K State Sports Council, Govt. of J & K
- . Directorate of Economics & Statistics, Govt. of J & K
- . Department of Planning & Monitoring, Govt. of J & K
- . Directorate of Handicraft, Govt. of J & K
- . Department of Fisheries, Govt. of J & K
- . J & K Academy of Art, Culture and Languages, Govt. of J & K
- . Department of Forests, Govt. of J & K
- . Department of Finance, Govt. of J & K
- . Wild Life Department, Govt. of J & K
- . R & B (PWD) Secretariat, Govt. of J & K
- . (P&S) Power Development Department, Govt. of J & K
- . Department of Area Planning, Govt. of J & K
- . Department of Ladakh Affairs, Govt. of J & K
- . Archaeological Survey of India, Govt. of India
- . Lakes and Waterways Development Authority, Govt. of J & K
- . Department of Gardens and Parks, Govt. of J & K
- . Directorate of Archaeology J&K, Govt. of J & K
- . Department of Information, Govt. of J & K
- . State Commission of Women, Govt. of J & K

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- . Ministry of Tourism, Govt. of India
- . Tourism Corporation of India

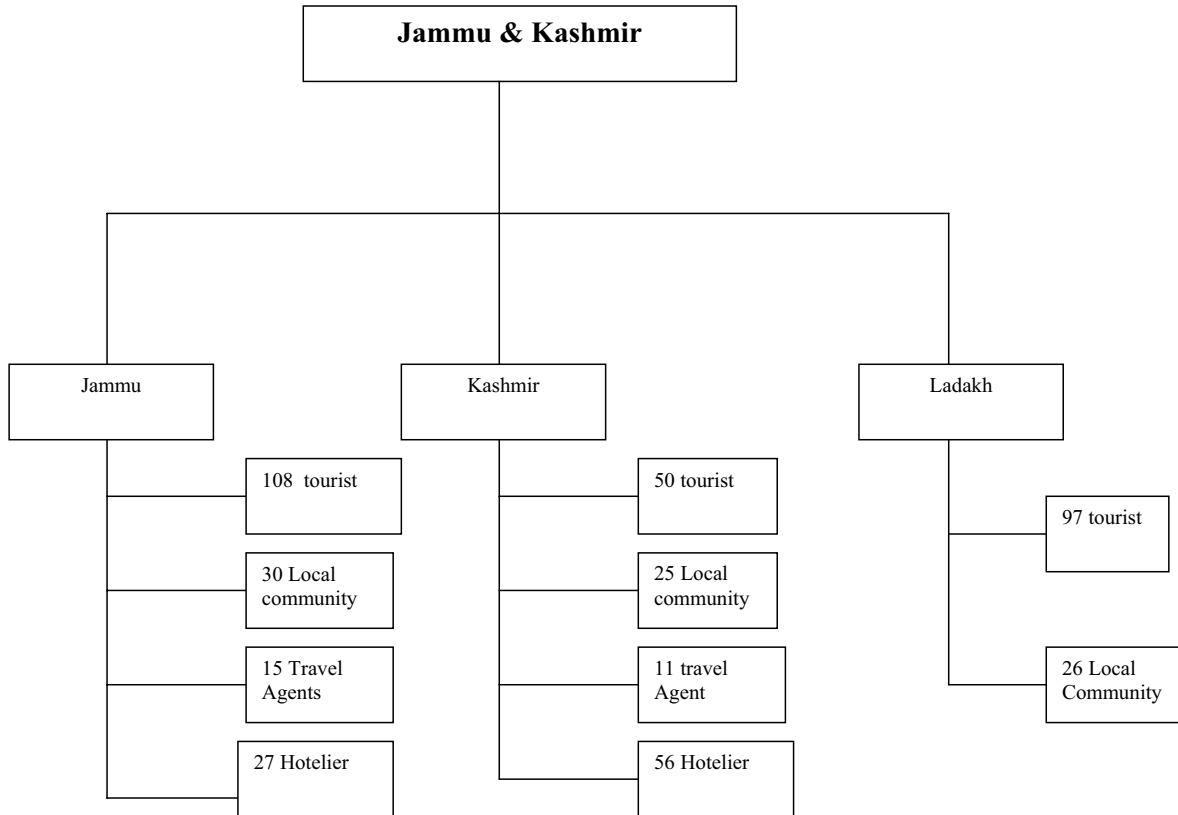
Sample Size

Successful contacts were established with the following number of stake holders for primary data collection from the three regions of the state:-

- 255 Tourists
- 81 Local Inhabitants
- 26 Travel Agents
- 83 Hoteliers

The figure on the next page gives a clear picture of the sample size from various distinct regions of J&K and the cross section of the stakeholders contacted.

SAMPLE SIZE



Focus Areas of Study

The key thrust areas kept in formulating the perspective plan were :-

- i) Enhancing the number of tourists visiting the state, both domestic and international
- ii) Enhancing the tourism potential of the State
- iii) Identifying new projects / activities which could be set-up for attracting tourists
 - a) Adventure Sports such as Rafting, Para-Gliding, etc.
 - b) Recreation and Entertainment
 - c) Conducted Tours

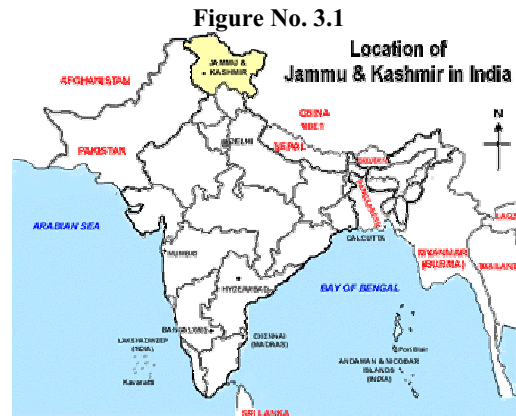
- d) Photography, etc.
- iv) Locational planning to develop new tourist spots, both as stand alone destination as well as part of a circuit.
- v) Infrastructure Development required both existing as well as new, to attract tourists
 - a) Basic infrastructure such as Roads, Power, Sanitation, Drinking Water
 - b) Other related infrastructure such as Parking Areas, Passenger Traffic Terminals, Access / Entry Points to Tourist Centres, Transit Facilities, International Class Signages, Night Lighting, Wayside Amenities, Shelters for rain / snow / sun etc.
 - c) Transport connections within / from and to various tourist spots / other destinations used by tourists (air, sea, road, etc.)
 - d) Boarding & Lodging Facilities such as Family Huts, Resorts, Bathing Huts, Honeymoon Huts, Executive Huts, Prefabricated Huts, Cafeterias, Tented Accommodation, Hotels, Restaurants, etc.
 - e) Communication facilities such as telephones, fax, e-mail, internet, etc.
 - f) Medical facilities, etc.
 - g) Other facilities such as markets, shopping malls, recreation, entertainment, etc.
 - h) Money Changing facilities
 - i) Security systems
- vi) Encourage private sector participation in tourism related activities
- vii) Promote Eco-friendly tourism
- viii) Employment generation
- ix) Disinvestment of Properties of Directorate of Tourism

BACKGROUND OF JAMMU AND KASHMIR

GEOGRAPHICAL LOCATION

Strategically located, Jammu and Kashmir State constitutes the northern most extremity of India.

Please refer the map at Figure No. 3.1



The State of Jammu & Kashmir is situated in extreme north of India between $32^{\circ} - 15'$ to $37^{\circ} - 05'$ latitude north and $72^{\circ} - 35'$ to $80^{\circ} - 20'$ longitude east. It is bounded by China in the north and east, by Afghanistan in the north-west and by Pakistan in the west. Punjab and Himachal Pradesh States border it in the south.

Jammu & Kashmir State has a geographical area of 222,236 sq. kms. (Refer Figure No. 3.2) comprising 6.93 per cent of the total Indian territory which includes 78,114 sq.kms. under illegal occupation of Pakistan and 5,180 sq. kms. illegally handed over by Pakistan to China and 37,555 sq. kms. under illegal occupation of China where Census could not be taken. Thus in an area of 101,387 sq. kms., 10,069,917 people inhabit, resulting in a density of 99 persons per sq. km. The division of rural-urban area is 100,436.9 sq. kms. rural and 950 sq. kms. urban with density of population 75 and 2,637 respectively. Leh (Ladakh) district has the distinction of being the largest district area-wise not only in J&K but also in India (45,110 sq. kms.) with second lowest density at 3 persons per sq. km, after Lahaul and Spiti in Himachal Pradesh which has the lowest density of 2 persons per sq. km.

Figure No. 3.2



The 101,387 sq. km. area of State is demarcated into 14 districts, 59 tehsils and 121 C.D. blocks which is further delimited into 2,661 panchayats, 75 urban areas and 6,652 villages and 281 uninhabited villages. The 75 towns include 7 urban agglomerations also.

As per Census 2001, the State ranks 11th in area and 19th in population among all the States and Union Territories of India.

The State is well connected with rest of the country by air, rail and road. The Indian Airlines and private airlines operate regular flights to Srinagar, Jammu and Leh.

The National Highway 1-A connects the capital cities of Srinagar and Jammu with the rest of the country. There are daily passenger trains connecting Jammu with most of the major cities of the country.

Table No. 3.1

State at a Glance

State Came into Existence	26th October 1947
State Capital	Srinagar
Area (in square km)*	101,387
Total Number of Households*	1,568,519
Household Size*	6.5
Population*	10,143,700 (Persons), 5,360,926 (Males), 4,782,774 (Females)
Status*	Ranks 11 th in area and 19 th in population in India
Total Number of District *	14
Total Number of Towns*	75
Total Number of Villages*	6652
Major Rivers	Indus, Chenab, Sutlej
Forest Cover	15% of the total area
Percentage of Urban/Rural Population*	24.8 (Urban), 75.2 (Rural)
Administrative Language	Urdu
Principal Languages	Kashmiri, Urdu, Hindi, Punjabi, Dogri, Balti, Ladakhi, Gujri and Dadri
Per Capita Income (NSDP) (1999-2000)	Rs. 7435/- (At 1993-94 Prices).
Population Density*	100/sq.km.
Sex Ratio*	892 Females/1000 Males
Birth Rate (2002)	19.2/thousand
Death Rate (2002)	5.7/thousand
Literacy Rate*	54.46% (Persons), 65.75%(Males), 41.82%(Females)
Literates*	4,807,286 (Persons), 3,060,628 (Males), 1,746,658 (Females)
Major Religions (1991 Census)	Hindu (32.24%); Muslim (64.19%); Christian (0.14%); Sikh (2.23%); Buddhist (1.17%); Jain (0.03%)
Schedule Caste Population*	770,155 (Persons), 403,256 (Males), 366,899 (Females), Percentage of SC (7.6)
Schedule Tribe Population*	1,105,979 (Persons), 578,949 (Males), 527,030 (Females), Percentage of ST (10.9)
Number of Workers*	3,753,815 (Persons), 2,679,941 (Males), 1,073,874 (Females)
Work Participation Rate*	37.0 (In %)
Major Source of Income	Agriculture (80% people's occupation)
Major Industries	Handicrafts & Handlooms
Major Tourist Places	Shalimar Bagh, Dal Lake, Gulmarg, Pahalgam, Sonamarg, Vaishno Devi etc.
Major Festivals	Janmastami, Hemis Gumpa festival, Id-ul-Fitr, id-ul-Juha, Muharram, Shivratri, Lohri

Note : * : As per 2001 Census.

It has four **geographical zones** namely:-

- Sub-mountain and semi-mountain plain known as kandi or dry belt,
- The Shivalik ranges,

- The high mountain zone constituting the Kashmir Valley, Pir Panchal range and its off-shoots including Doda, Poonch and Rajouri districts and part of Kathua and Udhampur districts
- The middle run of the Indus river comprising Leh and Kargil.

The State of Jammu and Kashmir is characterized by **three distinct Climatic regions** viz. Arctic cold desert areas of Ladakh, temperate Kashmir valley and sub-tropical region of Jammu.

There is a sharp rise of altitude from 350 mtrs to 8700 mtrs above the sea level within State's four degree of latitude.

The **annual rainfall** also varies from region to region with 92.6 mm in Leh, 650.5 mm in Srinagar and 1115.9 mm in Jammu. A large part of the State forms part of the Himalayan mountains. The State is geologically constituted of rocks varying from the oldest period of the earth's history to the youngest present day river and lake deposits.

Flora & Fauna

The State is rich in **flora and fauna**. In **Jammu**, the flora ranges from the thorn bush type of the arid plain to the temperate and alpine flora of the higher altitudes. Of the broad leaf trees there are maple, horse, chestnuts, silver fir, etc. At the higher altitudes there are birch, rhododendron, Berbers and a large number of herbal plants. The picture of a Duck as shown in Figure No. 3.3

Figure No. 3.3



In the hilly regions of Doda, Udhampur, Poonch and Rajouri there is a large and varied fauna including leopard, cheetah, deer, wild sheep, bear, brown musk shrew, musk rat. Varieties of snakes, bats, lizards and frogs are also found in the region. The game birds in Jammu include chakor, snow partridge, pheasants, peacock, etc.

Kashmir abounds in rich flora Refer **Figure No. 3.4**. The Valley which has been described as the ‘Paradise’ on Earth, is full of many hues of wood and game. The most magnificent of the Kashmir trees is the **Chinar** found throughout the valley. It grows to giant size and girth. The trees presents itself in various enchanting colours through the cycle of the seasons among which its autumnal look is breath-taking. Mountain ranges in the Valley have dense deodar, pine and fir. Walnut, willow, almond and cider also add to the rich flora of Kashmir.

The dense forests of Kashmir are a delight to the sport-lovers and adventures for whom there are Ibex, Snow Leopard, Musk Deer, Wolf, Markhor, Red Bear, Black Bear and Leopard. The winged game include ducks, goose, partridge, chakor, pheasant, wagtails, herons, water pigeons, warblers, and doves. In otherwise arid desert of Ladakh some 240 species of local and migratory birds have been identified including black-necked crane.

Figure No. 3.4

Rich Flora of Kashmir



The Ladakh fauna includes Yak, Himalayan Ibex, Tibetan Antelope, Snow Leopard, Wild Ass, Red Bear and Gazelle.

A major portion of J&K State consists of the western Himalayas, which besides many lofty mountain ranges with varying heights of 3000 to 6000 metres and above, also abound in rivers, lakes, passes, glaciers, plateaus and plains. The number of streams, brooks, hill torrents and rivers is also fairly large. The most important rivers are the Indus, Chenab, Jehlum and Ravi. Zaskar and Shyok

POPULATION

The **population** (2001) of the State, excluding the illegally occupied areas by Pakistan and China, is 10,143,700.

In population, the State is one of the smallest in the country and accounts for less than one percent of the people enumerated in 1981. Population showed sluggish growth in the first six decades of the present century and the decadal growth rate ranged from 5.75% to 10.42% during 1901 to 1961. The last two decades have, however, shown growth of 30.34% and 29.04%, which reflects considerable fall in death rate without any substantial fall in birth rate in the post independence years.

Growth of Population

The State has registered a net addition of 22.66 lakh persons raising the population from 78.04 lakhs in 1991 to 10,143,700 lakhs in 2001. The state population contributes less than one percent of the country's population. Nevertheless, the rate of growth observed during the last two decades at 30.34 % and 29.04% has been substantially higher than the national growth rates of 23.86 % and 21.34% respectively. The annual growth rate of 2.97% during 1971 –81 is the highest the state has ever experienced.

Rural and Urban Population

As against one third in Maharashtra and West Bengal and one fourth in Karantaka, only one fifth of the population in J&K resides in urban areas. 23.83 % population has been recorded as urban in the state against the National Average of 25.72%. Jammu city has recorded very rapid growth and presently ranks as the 48th biggest city in the country. Besides the cities of Jammu and Srinagar, other important towns are the district headquarters of Anantnag, Pulwama, Budgam, Baramulla, Kupwara, Udhampur, Kathua, Rajouri ,Poonch ,Doda, Leh and Kargil.. The remaining towns continue to have many rural features and pursuits reflecting the state's predominant Agro-pastoral economy.

HUMAN RESOURCES DEVELOPMENT

Against the All India Level of 65.38% as per 2001 census, the rate of literacy for the State is indicated as 54.46% with 72.17% for urban areas and 48.22% in the rural areas, 65.75% among males and 41.82% among females. District Jammu with 77.30% tops the literacy level with male literacy at 84.92% and female literacy at 68.75%. A special emphasis is being laid on development of human resources in the State.

As per the census 1981, there were more than 15000 schools with an enrolment of about 1.5 million. Similarly, there are 32 colleges with an enrolment of about 0.40 lakhs. For higher studies, there are now three universities, one in Jammu and others in Kashmir. The total number of students in general education at the university stage is about 0.4 lakhs which includes 14,083 females. The number has gone up six fold since 1950-51 when it was 2669 only.

The professional Institutions include the following with an enrolment of about 4000.

- two Engineering Colleges one each in Srinagar and Jammu,
- four Polytechnics
- 37 Industrial Training Institutes

There is one Medical Institute, four Medical Colleges, 100 Hospitals, 343 Primary Health Centers and 3326 Medical Sub Centers with total bed strength of more than 10,000 in the State. The availability of human resources includes about

- 23000 graduates and post graduates
- 4500 Degree/Diploma Engineers
- about 12000 ITI trained personnel, and other skilled personnel.

STATE'S GEOGRAPHY

The State of J&K in spite of our effort to read the whole area as one, is three very distinct special regions that of Kashmir herein referred to only as Valley, Jammu which also includes areas of Rajouri and Poonch and lastly the region of Ladakh including areas of Kargil Drass and Zaskar. By the very nomenclature of the State, that of Jammu & Kashmir, the region comprising of Ladakh was overlooked for a considerable time by the State Government as a place for developing tourism.

Past studies undertaken by individuals, State and Central organisations examining the potential of developing tourism or analyse the trends, have remained focused to the Valley. Even here the scarcity in the number of such studies embarrassingly made our task extremely difficult to analyse the past and provide projections for future development.

The State should be considered as a hills State like Uttranchal, Mizoram, Nagaland Arunchal Pradesh Sikkim or Meghalaya. The common feature in all these mentioned areas is the lack of plain areas. Such areas are only fraction of the whole area consisting of hills and mountains with their characteristics. Within the State J&K as of today the lowest point is to be found near Pathankot at a height of 370 mtrs. (1200 feet above sea level while the highest point is 86209 mtrs. (266000 feet above sea level in the north of State). While the State is having a large number of valleys the widest

and the biggest of them is the Jehlum Valley which constitute of the area of Kashmir, The other valley is the Indus/Leh Valley in Ladakh. The drainage system of the State includes rivers Indus, Chenab, Jehlum and Ravi which after entering the territory of Punjab fall into the mighty Indus in Pakistan. Indus (Sindhu) within the State is approximately 380 Kms in length and is often overlooked as an Indian river.

The state can be likened to a house with many storeys. The door is at Jammu and this house faces south looking out on the plains of Punjab. This area is consisting of low hills and vast river beds.

The first storey is the region falling in the slab of 350 mts and 2500 mts. This is the belt of hills in the areas of Udhampur, Bhadarwah and Kishtwar.

The second storey includes the mountain range of Pir Panjaal and the Jhelum Valley. The third storey leads the traveller into Kargil and Zaskar area. The fourth storey are the mountains surrounding the Indus Valley and the fifth storey are the high mountains in the belt of 7000 mts. to 8700 mts. of the Karakoram range which merge into the Kuenlen range. The Karakoram range pass at 5995 mts. (18,315 feet) is the north most accessible point in the country.

The celebrated Kashmir valley is 135 kms (84 miles) in length and 32 kms to 45 kms wide. The natural entry to this valley could be made through the Uri Gorge on river Jhelum in the west of the valley but now the Banihal and Simthin are used to enter the valley from the south end, while Zozila pass in the east part provides an entry into the valley from the Ladakh region.

The state abounds in large lakes, the biggest of the fresh water lake being Wular, Dal and Manasbal lakes. The biggest brackish water lakes are Tso Moriri and Pangong Tso in Ladakh region. A large number of smaller lakes in the higher reaches of the mountain ranges provide surprises for those who can reach them trekking.

The best known artisan springs in the valley are also sacred. They are Verinag, Kokarnag, Anantnag, Achabal, Maliknag and Chashmeshahi.

The state of Jammu and Kashmir has extremes of temperatures with summer temperature at Lakhpur near Pathankot in south Kashmir recorded over 46 Celsius (118 Fahrenheit) and winter at Daulat Beg Oldi or Drass in the north recording minus 46 Deg. Celsius (minus 70 deg. Fahrenheit). The diversity in climate is also seen in the many district races who occupy pockets in the State and create the fractured local politics which is the bane of administrators. The principle tribes in the state are the Dogras of Jammu and Gujjar in Doda, the Bakarwals in Kargil, the Chibs in Rajouri areas and the Rajput in Doda, the Brahmins in Bhadarwahm the Tibetans in South Ladakh and Shuks in Kargil. The Kashmiri Brahmin (Pandit) is now an extinct tribe (!) in the valley more or less.

The state has adequate irrigation facilities from the perennial streams. Its main rainy season in the valley is February and March but cloud bursts are common in July and August. Ladakh area receives its waters by snowfall in February and March. Jammu receives rains in July, August and September.

The state is rich in flora which find use in medicines, agriculture and in handicrafts activities. Numerous plants yield dyes and tans which are used in the embroidery work. The state has large meadows where cattle grazing is permitted.

The fauna consists of endangered species of deer family, Ibex, mountain cats and chiru goats. A large number of birds are found but all have migratory patterns and leave the cooler areas to move into Punjab in winter season.

There are thirteen type of local fish but the trout fish introduced from Scotland in mid- 19th century is most popular and farmed in the streams in Kashmir.

The state of J & K is historically known to be an area which has had a very violent past. It has also suffered massive epidemics. It is only after 1947 that the population of the state began to show a sharp increase.

The employment levels in the state are low. There is reasonable employment and in winters the poorest of the poor move to the Punjab, Haryana and Delhi to work as porters or casual labour at work sites.

The state of J & K is not found amongst the prosperous states of the Union. Its industrial base is small and is presently the adverse economic effects of militancy have scarred the landscape.

The state is identified strongly in its heritage and socio-cultural assets.

TOURISM AT A GLANCE GLOBAL & INDIAN SCENARIO

GLOBAL TOURISM SCENARIO

Tourism is the fastest growing industry globally accounting for 7% of total capital investment in the world and annual revenues approaching USD 500 Billion (USD 476 Billion in the year 2000 as per WTO estimates). There were 698 million international tourist arrivals in 2000 which are expected to reach 1.6 billion by 2020 as per the World Tourism Organisation (WTO) estimates. The airline arrivals are expected to double by 2010. The World Travel and Tourism Council (WTTC) estimated global tourism turnover to account for 10.8% of the global GDP in 2001. It accounts for roughly 35 per cent of global exports of services and over 8% of global exports of goods(WTO). In 1995, 11 per cent of the global workforce - over 200 million people - were directly or indirectly employed in tourism which is predicted to rise to 340 million by 2005 (International Labour Organisation - ILO). These figures make tourism the world's largest employer and arguably it's largest business in terms of income.

Leisure is estimated to account for 75 per cent of all international travel. Domestic tourism (people going on holiday in their own country) is generally thought to be 4-5 times greater than international arrivals.

- For 83 per cent of countries in the world, tourism is one of the top five sources of foreign exchange.
- Caribbean countries derive half their GDP from tourism. (World Resources Institute)

Major Tourist Destinations

Three quarters of all international travelers visit a country in either Europe or North America. Among all the regions, Asia - Pacific region is emerging as the No.1 tourist destination with an annual growth rate of 7 - 8 %. The share of international tourists travelling to Asia and the Pacific rose from just 1 per cent in 1950 to 16 per cent in 2000 (Refer **Table No.- 4.1**). By 2020, Asia will be the most popular

destination after Europe, attracting a quarter of world tourist traffic. China is expected to unseat France as the most visited country and to become the fourth largest source of tourists. However, India's Share of the global tourist traffic is **JUST 0.34 %**.

Table No.- 4.1
International tourist arrivals, millions (WTO)

Country	Year 1999	Year 2000	% of tourism market, year 2000
Africa	26.5	26.9	3.9
Americas	130.2	122.3	17.5
South East Asia and the Pacific	103.4	118.0	16.9
Europe	379.8	403.3	57.8
Middle East	18.1	20.0	2.9
World	649.9	698.7	

- International tourist arrivals.** According to the data released in June 2002 by the WTO Secretariat, international tourist arrivals amounted to 639 million in 2001 (Refer **Figure No.- 4.1**) (-0.6% compared to 2000) (Refer **Figure No.- 4.2**), 4 million down from the 697 million of 2000 due to the weakening economies of major tourism generating markets and the impact of the terrorist attacks of September 11. Most affected regions were South Asia (-6.3%), the Americas (-5.9%) and Middle East (-3.1%). Europe registered the same decrease as the world (-0.6%), and Africa and East Asia and the Pacific recorded positive percentages of 3.8 and 5.5 respectively.

Figure No.- 4.1

% Change in International tourist arrivals



Figure No.- 4.2
Total number of International tourist arrivals



Table No.- 4.2
Top 10 tourist destinations (International tourist arrivals, millions, WTO)

Rank	Country	Year 1999	Year 2000
1.	France	73.0	74.5
2.	United States	48.5	52.7
3.	Spain	46.8	48.5
4.	Italy	36.5	41.2
5.	China	27.0	31.2
6.	United Kingdom	25.4	24.9
7.	Russian Federation	18.5	22.8
8.	Canada	19.5	20.4
9.	Mexico	19.0	20.0
10.	Germany	17.1	18.9

Major Tourists Originating Countries

Over 80 per cent of international tourists come from just 20 countries in the North - 17 in Europe plus the USA, Canada and Japan. Five nations (the US, Japan, Germany, France and the UK) account for almost half of all tourist spending. Around 15 per cent of tourists originate in East Asia and the Pacific and 5 per cent in Africa, the Middle East, and South Asia combined (Refer **Table No.- 4.3**).

Table No.- 4.3
Tourists by originating region, % of all tourists (WTO, 1998)

	%
Africa	2.5
Americas	19.6
East Asia/Pacific	14.6
Europe	58
Middle East	1.6
South Asia	0.9
Others/unrecorded	2.9

Over half of all spending on tourism is spent by travellers from just six countries.

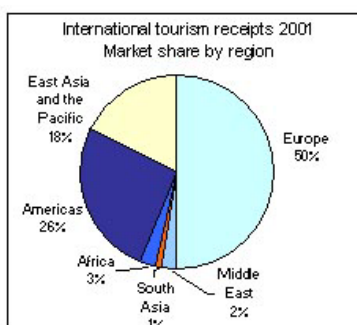
Table No.- 4.4

Tourism expenditure by country : top six tourism markets, 1998

S.No.	Country	US\$ billion	% of all tourism spending
1.	United States	56.1	14.8
2.	Germany	46.9	12.4
3.	Japan	28.8	7.6
4.	United Kingdom	32.3	8.5
5.	France	17.8	4.7
6.	Italy	17.7	4.7
	Combined share of tourism spending	199.6	52.7

- International tourism receipts.** 463 billion US\$ international tourism receipts were recorded worldwide in 2001 (-2.6% over 2000). Tourists shifted their travel habits during this period of time, they chose closer and less expensive destinations. Half of the receipts were collected by Europe, and almost a third by the Americas (17.7%), followed by East Asia and the Pacific (17.7%), Africa (2.5%), Middle East (2.4%) and the last in the list, South Asia with 1 per cent. (Refer **Figure No.- 4.2**).

Figure No.- 4.2



The top 15 tourism markets (the above six plus the Netherlands, Canada, China, Austria, Belgium, Sweden, Russia, Switzerland and Australia) combined accounted for 72.7 per cent of all tourist spending.

Growth of tourism

International tourist arrivals increased from 25 million in 1950 to 698 million in 2000, and are predicted to grow to 1.56 billion by 2020 (WTO). Globally, the tourism industry is growing at 4.6 per cent (WTTC). The number of air passengers rose from 9 million in 1945 to 88 million in 1972, 344 million in 1994 and 1.6 billion in 1999, and is expected to double again by 2010. (International Civil Aviation Organisation; *In Focus*, Autumn 2000).

Future Outlook : Tourism recovery is underway: fear is progressively fading away and business is gradually returning to normal although some destinations might be negatively influenced by the fact that operators have reduced capacity. Recovery is most visible in intraregional travel, and in the regions of the Pacific, Europe and Africa.

Factors in tourism's growth include:

- **Increasing leisure time:** In 1936, the International Labour Organisation convention provided for one week's leave per year for workers in developed countries. In 1970, this was expanded to three weeks, and in 1999 to four weeks.
- **Increased disposable income:** Spending on leisure in the UK has risen from 9 per cent of household income in 1978 to 17 per cent in 1998 (Tearfund: *Tourism: An Ethical Issue*, 2000). In 1998-99, the UK Family Expenditure Survey found UK households spent £936 a year on holidays: 4.5 times more in real terms than 30 years previously.
- **Falling real cost of air travel:** Between 1978 and 1998, the real cost of air travel fell by 35 per cent (Air Travel Association). A thousand miles of air travel now requires 61 hours less work than it did a generation ago.

Growth of tourism to the South

In 1950, 97 per cent of international tourists went to Europe or North America (in fact, to just 15 countries). By 1999 this had fallen to around 75 per cent. In the mid-1970s, 8 per cent of all international tourists were from the North visiting the South. By the mid-1990s, this had risen to 20 per cent (Honey). In 1999, more than 70 countries received over a million international tourist arrivals.

Growth of tourism in/ from the South

In recent years, domestic and intra-regional tourism in the South has grown rapidly, especially in emerging economies such as Thailand, India, Korea, China and Mexico.

- Tourists originating in East Asia and the Pacific increased from 32.4 million in 1985 (9.9 per cent of world total) to 92.9 million in 1998 (14.6 per cent of world total).
- In 1995, 108 million people worked in tourism in China and South Asia, compared to only 42 million in the North (North America, Australasia, Japan and the European Community).
- Intra-regional tourism (people travelling within the same continent/region) accounted for 73 per cent of total tourist arrivals in East Asia and the Pacific in 1998. In Africa, intra-regional tourism increased from 38 per cent of all arrivals in 1980 to 60 per cent in 1990. (WTO)
- 90 per cent of visitors to national parks in Thailand, India and South Africa are domestic tourists. (Ceballos-Lascurain 1996). Of 200,000 annual visitors to Kinabalu National Park in Sabah, Malaysia, 90 per cent are Malaysian. At Mt Bromo in Java, Indonesia, 70 per cent of visitors are Indonesian.

(WTO figures for 1994, millions)	India	South Africa	Brazil
Domestic tourist nights	135	12	96
International arrivals	1.88	3.66	1.7

Global Industry Organisations

- **World Travel and Tourism Council (WTTC):** A trade association based in Brussels and London and made up of around 70 chief executives of major airlines, hotel chains, cruise lines and catering companies.
- **World Tourism Organisation (WTO):** based in Madrid and created by the United Nations, the WTO consists of a mix of 130-plus governments and 350 affiliated private enterprises. Compiles industry statistics and market trends.
- **American Society of Travel Agents (ASTA):** The largest travel trade association in the world, representing 26,500 travel agents in 170 countries (Honey).
- **Association of British Travel Agents (ABTA):** The trade association of the major British tour operators.

Tourism : INDIA

The tourism industry in India has come a long way from just 15,000 tourists in 1950 to 2.64 million in 2000. The foreign tourist arrivals into India too have increased significantly. However, it is a different story that India's share in world tourism continues to be at a dismal low.

But, in the last couple of years, global tourism has witnessed an impressive growth. Globally, International tourist arrivals reached 699 million in 2000, almost 50 million more than in 1999. But the 'Mayhem at Manhattan' on 9/ 11 created havoc in the industry. The global tourism industry was hardly hit by these unfortunate incidents, which also had an adverse effect on India. Both inbound and outbound tourism were badly affected. Though nearly ten months have passed since then, things have not brightened yet. But the industry is slowly and steadily coming to terms with the situation and showing some signs of recovery.

Experts feel that over-emphasis on foreign tourists had made matters worse for us. They feel that this is an opportune time to promote domestic tourism in the country, which has tremendous potential for growth and we could have withstood the onslaught had we concentrated on it earlier.

In the last one decade, domestic tourism in the country has grown by over 100 million from 63.8 million in 1990 to 176 million in 1999. However, much of this traffic is concentrated in states like Rajasthan, Maharashtra, Gujarat, Kerala, Goa, Himachal Pradesh and Uttaranchal, etc. But unfortunately the flow of domestic tourists into the eastern and north-eastern parts of the country are much lower compared to other parts of the region, although, there is a very large outflow of tourists from the eastern states, particularly from West Bengal to other parts of the country. Though, the eastern states have all the potentials to become ultimate tourist destinations. Except for a desert, the region has everything.

If we analyse the situation, we would find that not only lack of proper marketing initiatives but improper & inadequate 'tourism' infrastructure, are a serious impediment to the growth of tourism in this region. However, the silver lining is now, respective state governments have realised the importance of tourism as a revenue earner and have started investing huge sums on putting in place a proper 'tourism' infrastructure. The state tourism departments and boards are openly seeking the participation of the private players in promoting tourism in the region. The private entrepreneurs too have reciprocated favourably to the call. Initiatives like these are sure to bring a 'turnaround' in the industry.

India's peak holiday season is between the cooler months of October and March. Tourism drops in the summer months when temperatures soar as high as 47 degrees Celsius, in some places.

Despite being home to the Himalayas and jungles and boasting a rich history and sun-soaked beaches, India attracts just 0.34 percent of the global tourist market. About 2.6 million foreign tourists -- mostly budget travelers and backpackers -- visited India in 2000. Tourists numbered 2.4 million in 2001.

Tourism Hubs in India

There are currently three well known plans of visits to tourist spot in the country, namely, the Buddhist religious tourism focused in the State of Bihar, Orissa and Uttar Pradesh; the Mughal tourism centred in the so called Golden Triangle of Delhi, Agra and Jaipur, and the Sangam civilisation experience in the States of Goa Kerela, Karnataka and Tamilnadu. Normally the international tourist coming to India keeps Kashmir out of their travel itinerary because of the uncertain law and order situation, moreso as projected by the media.

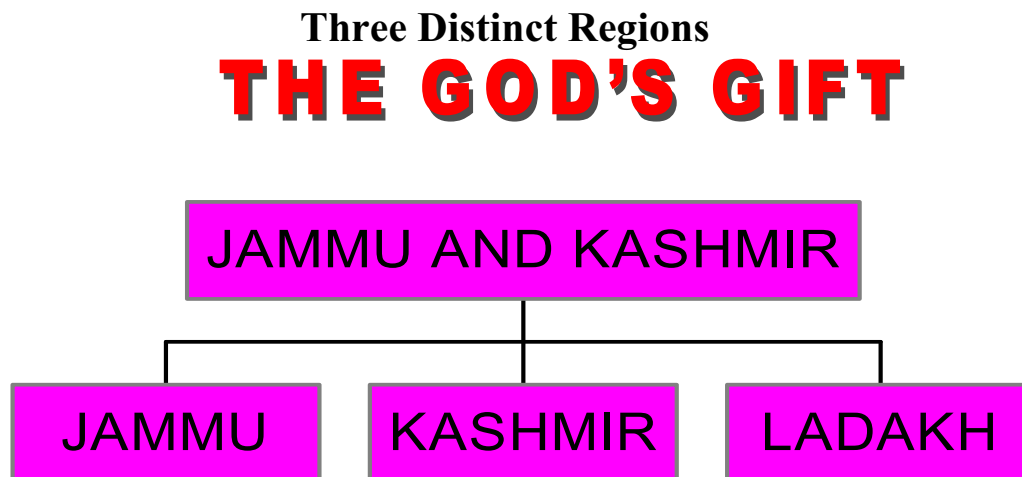
India offers 3606 protected monuments, 483 wild life sanctuaries, vast bounties of majestic mountains, beautiful beaches, proverbial hospitability, which is unquestionable. And yet we have failed to attract foreigners. Today we are also unable to convince the domestic tourists to consider the State of J & K and all its natural resources and its heritage, as a destination for rest, recreation and informal education.

TOURISM IN JAMMU AND KASHMIR

Tourism in the state has led to the development of the whole service industry including transport, hospitality, camping, retail shops, horticulture, and in the small-scale sectors, but it has remained quite susceptible to even minor changes in the law and order situation in the state. This is evident since the year 2000-01 when international tensions of the border affected the tourists traffic in both foreign and domestic sectors in the regions of Ladakh and the Valley, it resulted in a severe recession in the whole service industry.

Growth of this Industry for developing incomes and employment has remained an unpredictable feature. Growth in tourist traffic also continues to vary year to year in direct relations to the threat perception. To develop the infrastructure for the visitors, advance planning in each sector of the industry for the opening of new facilities is a must. If this is not kept in our perspective, there can be no planning for future. However, most of the departments in the Government of J&K are not practicing advance planning.

Since the state is having three distinct regions, these regions have to be looked distinctively. Each region has its own perspective, culture, language, people, attraction, etc. It is very essential to keep this in mind while formulating the policy, plan, etc.



The region of Ladakh is the choice of foreign tourists; Jammu attracts pilgrimage tourists, while the Valley attracts a larger number of domestic tourists and a fair sprinkling of foreign tourists. At the time of writing this report, Ladakh had quite a number of tourists from Israel, Germany and France while in the Valley, a few tourists mostly from Italy and England were present. The Jammu region has foreign tourist only as transit passengers (on their way to the Valley or Ladakh) who are not destined to any tourist spots in the Jammu area; therefore they do require current mention herein.

The Consultants had undertaken a survey in which appreciable number of contacts were made with various stakeholders, tourists, who were related directly or indirectly to the various sub sectors of tourism.

HISTORICAL PERSPECTIVE

Original Reasons for Human Movement

In historical time people, moved from one place to another for three good reasons, namely, the local places became difficult to live in, for undertaking commerce, or to conquer new territories to add assets to their own Society.

Mughals as Tourists

The mughals under Emperor Jahangir were the first tourists into Kashmir but in this case it was only a royal visit, which did not lead to the subjects to follow suit and create an infrastructure for the hospitality industry.

Summer Holidays for the British in India

Colonialism led European nations to move over large tracks of land to settle with their families and govern locally acquired assets. When family members returned home they gave description of the new lands they had visited. On the sub-continent of India when British nationals of imperial administration had to live here on a long-term basis, they got to know that the Indian Summer was unlivable for them and they sought cooler climates. Professional knowledge of having to fight the

Afghans, Sikhs Dogras and the Gorkhas, led these British army officials into the Himalayas and they discovered their little Scotland. The Northern most area of the sub-continent was thus discovered and inhabited by British nationals in the period of 1825 to 1840. It was under these circumstances that tourism 1st came to this part of country & a convenient way to enter the Valley was through Uri Gorge.

Opening of Kashmir

Once having stepped into this area, missionary zeal led pioneers to undertake treks of discovery into other parts who made observations and reports prompting others to follow their route. Ladakh was first visited by the Monrovia priests sometime in 1847.

The consolidation of the various minor ruling states of the region with disparate cultures and religions was held together by the presence of the British army, which supported the Maharaja of Kashmir. The events of 1947 brought a severe strain on the existing strategic arrangement.

Rise of Domestic Tourism in J&K

In spite of the fact that during the period of 1948 and 1950, Kashmir was in newspapers, this area did not interest the people of other part of the Sub-continent to visit. That is not until Shakti Samant released his film '**Kashmir Ki Kali**' in 1956, which overnight brought the knowledge of the beautiful landscape and territory to the knowledge of the urban population of India, and the rush was on. In 1988 the Valley had been visited by a record number of over 722,000 lakhs tourists and if the percentage of annual rate had continued uninterrupted, the year of 2002 should have seen the Valley is being visited by 1.87 million people from other parts of the country. But because of uncertain law and order situation affecting the state, this ever increasing tourist traffic dramatically fell to an unbelievably low of 6600 tourists visiting the valley in the year 1993.

It is between these two statistical extremes, an effort has been made to work out a way through to develop a new plan of revival of tourism for the State & contemplate a scenario for the next 20 years.

International Tourism Vs. Visitors to India

In undertaking such a project we have to also consider other related factors and among the most important factor to consider is the international tourist, and on why he should shift his preference from well known European tourists centers to make his way into India.

During 1990-2000 India's share of global tourist traffic remained static at 0.34 percentage of the global share. Today in fact it has declined. In 1950 this share stood at 0.54 percent.

The revolution in tourism sweeping since 1960 eventually passed by India. It is estimated that in the year 1964 one hundred million tourists moved out of their homes to visit areas located far away. This increased in 1974 to two million persons, and in 1992 a world population of seven hundred million was trekking, flying or sailing around. It was doing so beyond the intend of commerce, acquire new assets or beyond the reasons of inhospitable condition at home. Tourism was the new name given to migration for 'rest and leisure'. India did not interest this vast population, as our share remained somewhere around 26,00,000 visitors by the end of the 20th century.

Trends of Tourism in State

Tourism is one of the State's major industries. It has played an important role for developing the economy, particularly in the Valley and Ladakh. The industry has given jobs to a very large number of people, particularly younger generation & has generated economic activities in the primary, secondary and tertiary sectors in the State, which owes dependence to a large extent to this industry.

An attempt in brief is being made here to give an idea of the trends noticeable in tourist's traffic in the State. A mention has to be made on the lack of availability of data on records for various reasons. Because of this no data has been mentioned before 1976 for the regions of Jammu & Ladakh.

The first known data available on tourists traffic into the State goes back to the pre-independent days when in 1945 the State received 37,297 "non-residents." Its distribution regarding the destination of the visitors, is unknown. The figure is based on the recording of the entry permit of the Non Kashmiri at the entry point of the State border posts both on the Pathankot and Sialkot side. The

Partition of the Sub-continent in 1947 and the events of the 1948 disturbed the borders of the State, and all its existing data on population and demography. The first data is only now a matter of academic interest. In the availability of new data in 1951, 10,579 visitors entered the State of J&K. This figure increases to 24,455 in 1961 and to 184,790 in 1975 which shows nearly an eight time increase in the arrival of tourists in the State between firstly 1951, 1961 & a double presence in the subsequent decade

Interestingly in 1951 there were only 1,246 foreign visitors and we may presume that within this small number, there would have been sizable number of representatives from the European forces of the United Nations and not true foreign tourists.

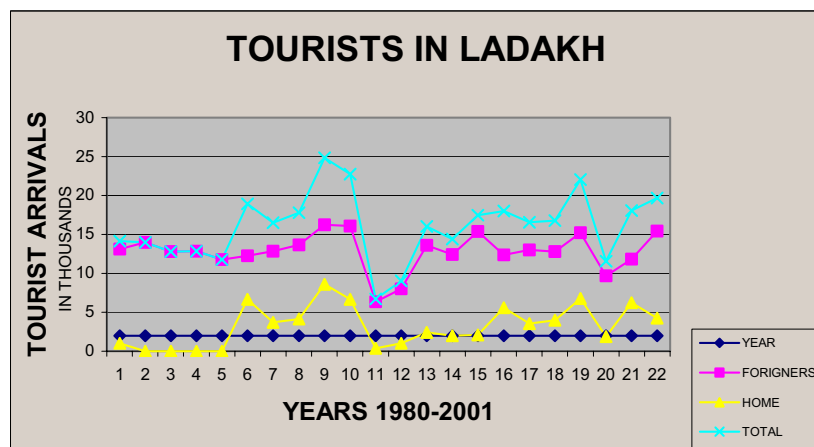
There were 2,22,214 foreign visitors in the year 1975, in the post Indo-Pak war and declaration of the internal emergency in the summer season. This has increased from 1,246 in 1951. But in the context of world interest in tourism however, this figure is very negligible to any standards.

Over the years the tourist arrivals in various regions has been provided in the corresponding paragraphs/ figures/ Tables.

Trend of Tourism in Ladakh

The Figure No. 5.1 shows that there is a constant increase in the total (including foreign & domestic) tourist arrivals in Ladakh except in few years when uncertain law and order was at its peak.

FIGURE NO. 5.1



The data of visitors in Ladakh (Refer Table No. 5.1) for the past two decades is given below. The figures miss on the entry of the domestic tourists in the region for four years. We can assume an adhoc number of domestic tourists to the extent of 1000 visitors per year, to fill up the blanks in the places with N/A, the data is enough to show the strong typical presence of a particular type of tourists who is a visitor to the region.

Table No. 5.1

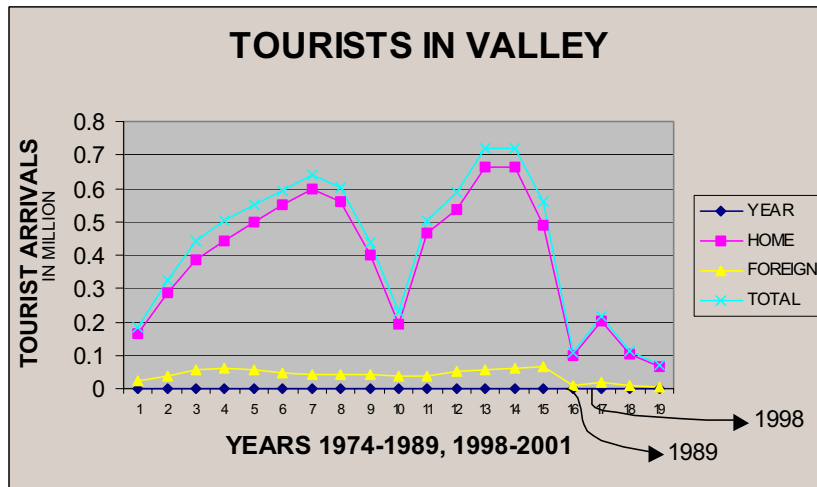
YEARWISE TOURIST ARRIVAL BY AIR/ROAD TO LADAKH

Year	No. of Foreign Tourists	No. of Home Tourists	Total
1975	650	128	778
1976	1798	253	2051
1977	7127	266	7392
1978	8748	873	9621
1979	9213	621	9834
1980	13101	1013	14117
1981	14000	NA	14000
1982	12786	NA	12786
1983	12833	NA	12833
1984	11785	NA	11785
1985	12245	6666	18911
1986	12828	3683	16511
1987	13668	4114	17802
1988	16256	8608	24864
1989	16079	6669	22748
1990	6342	396	6738
1991	8014	1041	9055
1992	13580	2438	16018
1993	12401	2000	14401
1994	15369	2080	17449
1995	12391	5594	17985
1996	13036	3537	16573
1997	12810	3991	16801
1998	15229	6767	21996
1999	10234	2110	12344
2000	11828	6227	18055
2001	15439	4260	19699

Courtesy : Directorate of Tourism, Ladakh

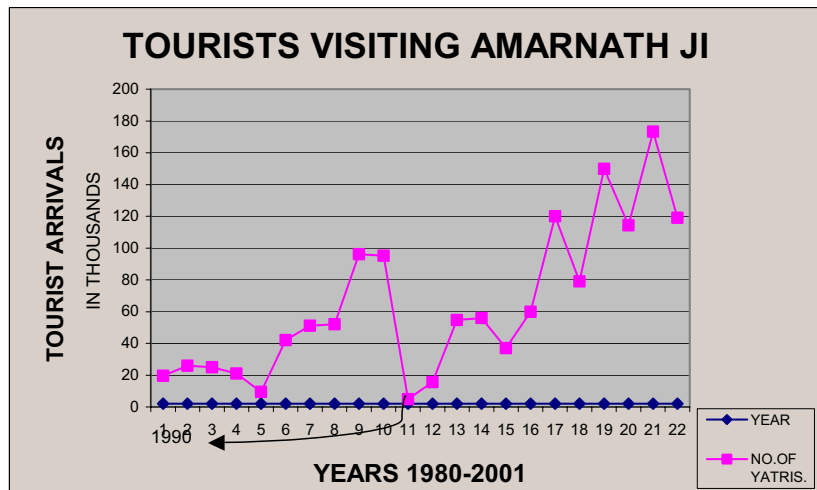
Trend of Tourism in Valley

FIGURE NO. 5.2



From Figure No. 5.2 we can see that there are two major dips in 1989 (when uncertain law and order was in the beginning phase) & in 1998 (when uncertain law and order was at peak phase) But the encouraging point is that there is growth after 1998 and would go further up if law and order situation improves.

FIGURE NO. 5.3



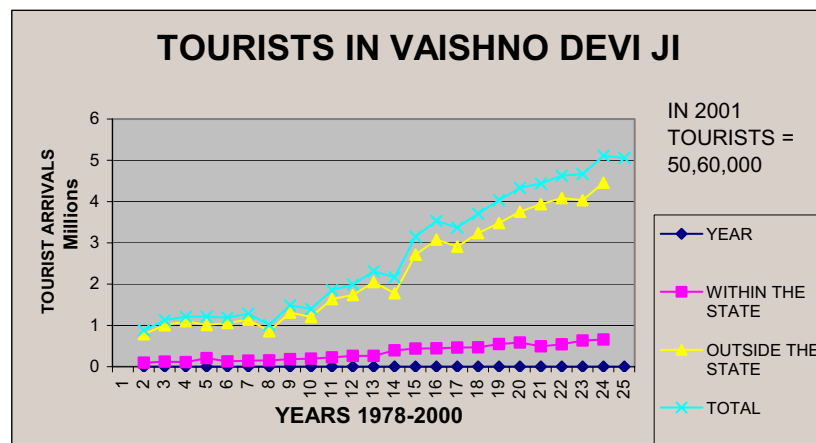
From Figure No. 5.3 we can see that there is continuous increase in tourists arrival after a major dip in 1990 and now the position is so that their are almost more than 1.2 lakh (ceiling on tourist arrivals has been imposed by the Government) people visiting Amarnath Ji.

Trend of Tourism in Jammu

Tourism in Jammu region has been mainly limited to pilgrimage by domestic tourists. The total figures on entry of domestic tourists into the State has a significant input of such tourists and it should be the effort of the State administration to make the movement of such pilgrims safe. This is an important feature in the perspective planning for domestic tourists.

Jammu city itself is the best known for its local domestic tourism. What strikes a person is the narrow focus of this domestic tourism which is working in the Jammu- Katra- Vaishno devi Temple corridor at the cost of other regions. The pilgrimage tourists visit a single destination and do not move into Doda, Poonch or Rajouri area. While Doda has some centers of religious interests where local villagers from the Chamba districts in Himachal Pradesh come to visit, the Rajouri-Poonch area is marked by a total absence of both domestic and foreign visitors due to the extremely insecure conditions prevailing because of its proximity to the Line of Control (LoC). Indeed, the Rajouri and Poonch areas are important areas for tourist interest having a huge potential for visitor traffic, once the border dispute between Indian and Pakistan is permanently resolved.

FIGURE NO. 5.4



From Figure No. 5.4 we can see that there is continuous increase in tourists arrival (there is no major dip in 1990 as in Ladakh & Valley) and now the position is so that there are almost more than 50 lakh tourists visiting Vaishno Devi Ji. But a significant point to note is that the total comprises of only domestic tourists/ pilgrimage tourists and insignificant foreign tourists.

Problems for Development of Tourism in J&K

In developing this Perspective Plan, some insight has also come into the possible reasons why we are saddled with the problem of lack of visitors. If any judgment needs to be passed on the total experience of the numerous visits, interaction with both official, institutional and individuals and the extended time spent immediately in the last decade with probing into the last 50 years, then one can only say that the fundamental reason why this area has remained lacking in its share of goodwill and attract tourism, is due to the poor culture of governance.

In every aspect of the studies carried out one realizes that the administration in this area has remained emotionally isolated, resulting in the lack of knowledge on the available replacement tools of administration. It has led to other problems better known within the country with its predictable predicament.

One of the limitations of this Report and its recommendations is, that the surveyors and their team members who moved in the length and breadth of the State territories and discussed the various issues and options, ended up with two general facts, namely, that an overwhelming number of Departments of State administration had no perception of long term perspective planning. Most of the Departments were not contemplating action beyond a five years time and where there was an exceptional case of a vision extended to 2020, this vision was factoring delays and there was no priority to develop a document, which could be termed as an authentic perspective plan. Mention on this will be made again in the Recommendations Chapter of this Report.

Poor Resource Management

The State has a chronic problem of lack of funds available to it, for the past 50 years the State of J&K did not have a culture to pay dues that belonged to 'Ceasar'! Tax collection has been dismal; there is institutional cynicism in the ability of the State to gather its claimed resources, and the administration has only the ability to pay salaries to its over bloated bureaucracy with no resources left in funds to undertake developmental activities, except that which is prompted by Central assistance through grants in aid, or soft loans.

A similar situation exists in some areas of the North-Eastern States but even when there are similarities, the State of J&K remains a unique singular model of current economic bankruptcy.

Ad holism in Official Work Led to Loss of Proper Initiative

It is because of the ad holism practiced in State administration and in tourism, that the State has lost valuable time and initiative in the past. The development of road infrastructure, to facilitate communication and travel ought to have been very high priority, particularly so when for the past 50 years this region has always been favoured in public opinions and on matters of National Security. Yet, the road infrastructure in the State has remained poor and strategic areas have remained unopened. Lack of resources has been stated as a cause of delay and this may be true.

It is a remarkable contradiction, to see that private building construction activity in the Valley was far more vigorous in the worst period the State suffered between 1991-97. These private houses have sprung up in an ad hoc manner on rural plots creating suburbs round Srinagar which has not been a part of urban planning. This is an example of the absence of proper planning.

Natural Resources

The region of Jammu & Kashmir is having vast natural resources, which promise prosperity to the people when such resources are properly conserved and exploited. Following are amongst the most bountiful natural resources:

- a) Generation of hydel power.
- b) Exploitation of natural scenic beauty.
- c) Tapping of mineral resources.
- d) Developing industries from forest resources.
- e) Development of agro based economy.
- f) Export of high value handicrafts.

The landmass of the State is 85 percent mountainous. It has a revering system which produces a high volume of water around the year, and which has high energy heads providing for very favourable conditions to use the water stream to generate electricity. This availability of power could lead to the development of non-boiler based industries . The main river system in the region are of Indus, Shyok and Zanskar in Ladakh region, Kishan Ganga and Jhelum in the Kashmir region, and Chenab in the Jammu region. The potential of tapping power using the hydroelectric system has not even crossed 5% of the identified levels in the State. Planned projects indicates that in the next 10 years, the State is likely to exploit its hydel energy potential only upon 15 percent The State has therefore very high levels of opportunities available to generate electric energy for not only its own use, but also become a major exporter of power to neighbouring deficit states of Punjab and Haryana There is a distinct future prospects of even exporting power generated in this region, to be transmitted as an export commodity to Afghanistan and the remote by accessed areas of the erstwhile State of Jammu & Kashmir now under the local administration of the Pakistan Occupied Kashmir government.

Traces of gold are still available and are actively collected from river Suru in Kargil and river Zanskar using the PAN method. It was the monopoly of the Maharaja of Kashmir, and the King of Ladakh in their respective territories.

Precious stones in vast quantities are available is mines in Doda area in Jammu region. The State is plentiful in forest resources but great damage have been done in the last 10 years of militancy which

has led to the cutting down of the most valued forest properties of the State by smugglers and foreign terrorists. It is possible to regenerate this wealth in the next 3 decades. Specialized forest products support a flourishing trade in handloom and woodcrafts, which generate revenue in the State and are linked with tourism. The carpet industry drawn from agro based activities, has a vast potential for growth. The State is aware of these factors.

Heritage and Socio Cultural assets

This region is more ancient historically than the rest of the country because it is nearest to the original seat of the human civilization.

In the distant past the region has seen the transit of many civilisation and has been the repository of all the major religious philosophy in the world. Therefore the region is very rich in its heritage, the local population makes it a point to let it be known to all sundry visitors how ancient is their local heritage. The area also has in the past seen the rise of systems in public administration, resource management, and in fine arts at a time when the rest of the country was ignorant of such skills. Geographically, the Ladakh region of the State has been connected with the culture of Central Asia, the valley has been linked with the civilization of the Middle East and the Jammu region has been close to Punjab and the Mohan Jo Daro culture. This was made very clearly when studies were made in anthropology and geology.

We are aware of this region from the time of Ramayana and Mahabharat. Kekai of the Ramayana came from South Ladakh. Mahabharat has references on Gandharv desh, which is a part of north Kashmir extending upto south Afghanistan. The earliest waves of human migration indicate a very vital connection with the Semitic culture of Babylonia, going back to 3500 BC. Early man was living and hunting collectively in Kashmir valley 40,000 years ago as has been found out in the latest excavations undertaken by the Department of Anthropology, University of Kashmir in the period 1999-20.

Today Kashmir valley enjoys a climate of the temperate zone, but 40,000 years ago this area was a warmer place, heavily forested with tropical trees and vegetation, and filled with animal life which was distinctly originating from the tropical zone of the Indian sub continent. The recovery of fossils forms speak of the ancient Kashmir, which is very well known to its local population.

Kashmir valley in particular has remained the seat of ancient learning. Out of the 14 known ancient reference places of cultural heritage, 12 places of such reference belonged to this region. Rulers of North India as far as from Patliputra sent the members of their families and officers of their kingdom to the monasteries and gurukuls, which were world famous in their ancient time.

The capital city of Srinagar was founded by Emperor Ashoka in around 320 BC. The Emperor made Srinagar the centre of Buddhist learning. The new town was academically connected with Taxshila and scholars made their homes in the valley.

Socio cultural interaction between Kashmir and other parts of India remained at-significant level with Adi Shankaracharya visiting the Valley all the way from the Karnataka area. The local king of Kashmir region had specially invited the Brahmins of Kannauj to migrate and settle in the valley in AD 800. These gentlemen from Kannauj laid the foundation of civil and political administration in the region, influencing generation of rulers as far as Nippon (Japan), Rus (South Russia), Caliphate (Mesopotamian delta) and in Saurashtra in the present West India. This ancient civilization has created its own local socio cultural milieu which is generally termed as Kashmiriyat. It is a mixture of Buddhist, Hindu and Islamic religious philosophies. Significant icons of the cult of Kashmiriyat have been found wide spread in this region indicating that even when the area has 3 clearly distinct political and religious regions, there is still a certain cultural commonality called Kashmiriyat, which keeps the area intact as one. From the point of view of promoting tourism this philosophy is most significant, as it is unique. There are parts in this area, which are truly isolated in the purest sense. For example, there are 3 villages located in the Pir Panjal range on the Rajouri side, which have been inhabited by the

progenies of the camp follower of Alexanders army. The men and women are all of Greek origin and speak a language which has no affinity with the local dialects. Again, there are 3 villages in south Ladakh deeply isolated which are inhabited by people who are the purest strain of the original Aryan civilization of Central Asia. The state government has banned entry of outsiders into these local areas to preserve their unique racial contents and ancient culture. Visitors entering this region as tourist are made aware of these unique social cultural assets of the State. If they find this experience enlightening, they return, to the state again and again, a fact, which has been confirmed by the consultants survey as well as those undertaken by others in the past.

The population census of the region was held under extremely difficult conditions during the year 2000-01. The results of this census are still in the stage of advance proposals and part results are only available. The State government is still relying on old data on population profile, of 1981 and 1991. Therefore no up to date information is available which could be incorporated in permanent records.

The consultants have a word of caution for the readers to keep in mind, The last decade of militancy in this region has prevented the local administration from undertaking normal activities of collecting data and other statistical index in the manner which would normally be found being regularly undertaken in other parts of the country. Data which is offered as upto date, should be read as provisional or as projections based on some original confirmed base, which may be as old as 1981. Therefore, the consultants don't advise any dependence of statistical information flashing around, as official documents related to the region, to make projections and prophesies, because a seemingly public activity tabulated in a particular time phase, may show a totally changed position within days and remain so, consistently for a very long period. The most consistent fact realized in the course of the study undertaken in this project was the State of uncertainty in all matters of public and governmental activity.

Present Status of Tourism in J&K

The state of Jammu & Kashmir remained a model state for the development of tourism in the country until 1987. The tourist department of other state governments sought advise of the Jammu & Kashmir government in most matters concerning the up gradation of tourist facilities in their respective regions.

Indeed, the paramount position of Jammu & Kashmir in the sector of tourism promotion and generation was not an empty boast. The state had a level of bed availability to meet the demand of accommodation for visiting tourists which at one time was the sum of the total bed availability level of the remaining states in the country. The manner in which the growth of tourism was measured during the year 1981-1988, including all types of tourists was un-matched in any part of the country. Only in the State of Rajasthan more foreign tourists visit annually, but this is off set by a bigger bulk of visitors who visited the state of Jammu & Kashmir drawn from various parts of India. Futuristic targets indicate that Srinagar airport itself would soon be enough to handle about 2 million travelers. The index of passengers using surface transport showed, that by 2018 the State could be swamped, with holidaymakers and others types of tourists accounting to over 10 million people.

Suddenly within one year in the period 1989-90 the colour of prosperity changed all indexes of economy in the State with a sharp southward path as militancy coupled with the migration movement of non-Muslim population in the state bought an unsettled environment. By 1991 there was a virtual shut down in the local economy, which led to distressed effect on the whole State & reached every household. Tourism, which was the main stay in the economy of J & K, was deeply affected by various circumstances created out of the violence associated with militancy in certain parts of the region.

In the period between 1990-97 the State administration was totally pre-occupied with dealing with the various social and economic problems arising out of wide spread militancy. The State administration finally showed the first success in taking control over existing militancy in 1997 and a period of relative calm was noticed. This had an immediate impact on the revival of tourism in the region and

particularly in the valley of Kashmir. The figures on tourists visiting the State are incorporated in this report for information. The revival of the tourism particularly in the valley of Kashmir in the years of 1998-99 received a severe setback, at the peak of revival activities, due to the Kargil conflict . The scare created by the Kargil conflict saw the tourists flee out the valley and brought a halt to the ongoing process of recovery.

The situation regarding the influx of tourists into this region, however, received less setback in the regions of Jammu and Ladakh. An increase of influx of tourists year after year is noticeable in Ladakh region in the decade of 1990-2000. In the Jammu region the total volume of tourists entering the State again shows impressive figures which also indicate that inspite of an environment, of militancy existing in the valley of Kashmir there was little or no impact on those visitors who had their destinations in Jammu region. (Please refer figures 5.1, 5.2 and 5.3)

The overall reading suggests that if the state government is able to control militancy and bring out the general state of law & order to the levels of the period 1987-89, it would be possible to bring about a dramatic recovery in the economy of the region within the next 5 years. Such a recovery as the Consultants anticipate is this perspective plan in its first time phase of 5 years, speaks repeatedly of the hope and aspirations of all to see the region bounce back economically, and see the return of peaceful days ahead.

The Consultants would also like to mention herein that in the history of this region, the first 35 years after 1950 have been the most prosperous period going back to at least last 800 years. Some of the considered factors for such progressive conditions can be identified as under :

- a. Lack of threat to the region from neighboring countries.
- b. Existing continuity in leadership.
- c. Development of agricultural and irrigation facilities.
- d. Massive state campaign to eradicate illiteracy.
- e. Development of tourism in the state, as an Industry.

ANALYSING TOURISM IN J&K, THEN- NOW - AFTER

In this section of the Chapter we are providing an analysis of the environment/ situation/ scenario prevailing in J&K viz-a-viz tourism. Here we analyse the environment in a tripartite way 'Then- Now- After', in such a manner that we get an in-depth view of the situations regarding tourism earlier, situations regarding tourism presently and the required situations regarding tourism in the future.

Please refer Figure No. 1 for the detailed tourism environment prevailing earlier and the environment that is prevailing now. We can see a major shift in terms of security threat, tourist inflow, Competition from other states, use of IT, changes in customers needs, availability of time for leisure with the tourists, seasonality of tours, spending pattern of the tourists, Governments approach, marketing of tourism, etc.

From the above we can state that it is a reality that the Customer / tourist is the King. The tourist comes with money to spend, but he will spend only when he gets real worth out of it. He wants to utilize his time, money, energy for the best options.

Please refer Figure No. 2 for the detailed tourism environment prevailing now and the environment that should be prevailing in the future to attract the tourists in masses. We are contemplating a further shift in the preferences/ tastes of the tourists. We have to comprehend, plan and implement our tourism policy in such a way that we are able to cash on, on the future trends by taking steps which would propel the tourism activities in J&K in the future. We see that the shift would be in terms of security (situation would be normal in 2-3 years), tourists tastes, tourism products, use of IT, marketing of tourism, availability of information, weekend tourism, time availability for tourism with the tourists, Value for the money & time, Government approach to become proactive and professional.

From the above we can comprehend that in the future the tourism scenario is going to become much more asking as the competition is going to increase from among the countries, states, destinations, type of tourism, availability of services, infrastructure, sensitivity of the tourists, utilization of time, money of the tourists, etc.

Keeping the above in mind we are providing a **SWOT** analysis from the tourism perspective in J&K, which has to be kept in mind for developing the perspective plan. The SWOT gives us the **Strengths** on which we can build on, **Weaknesses**, which we have to take care of by strengthening them, **Opportunities** which we should exploit and utilize to the best and the **Threats** which we have to counter for the development of Tourism in J&K. (Please refer Figure No. 3)

We are giving a psychological sketch of the stages / factors in selecting a tourist place by a perspective tourist. Please refer Figure no. 4 for the detailed stages, factors, the kind of options available, the type of thoughts which the tourists undergoes/ comes across while deciding for the tourist destination. If we are able to understand this we can very well provide the facilities, services to the tourists which could be unmatched and the tourists would come again and again and would also become ambassadors in propagating/ marketing the destination with the word of mouth (marketing without much of spending, which matters most in the case of foreign tourists)

Figure No.1
Analysis - Tourism in J&K

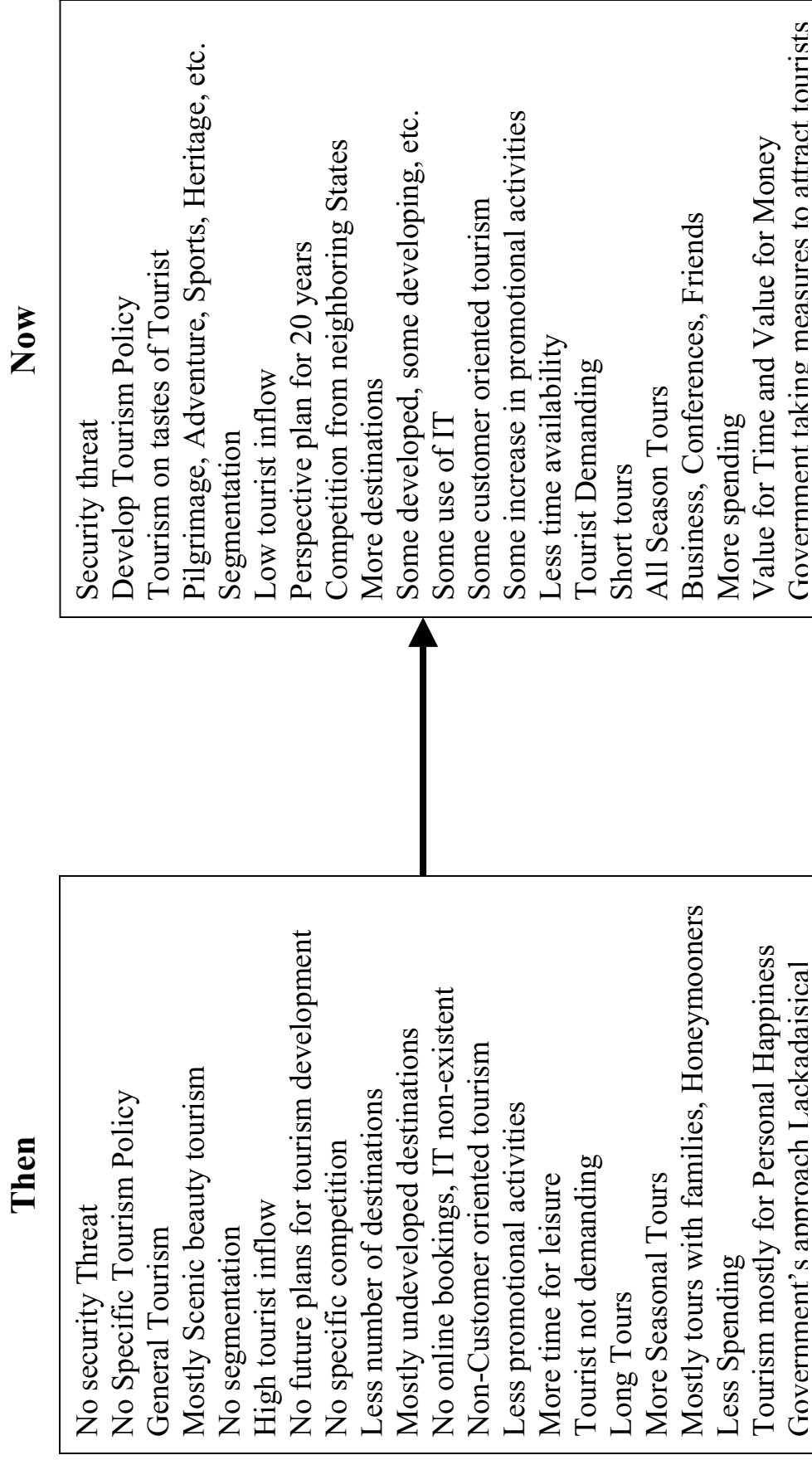


Figure No.2
Analysis - Tourism in J&K

Now

Security threat
Develop Tourism Policy
Tourism on tastes of Tourist
Pilgrimage, Adventure, Sports, Heritage, etc.
Segmentation
Low tourist inflow
Perspective plan for 20 years
Low connectivity
More time to visit Destination
Connectivity through roads
Competition from neighboring States
More destinations
Some developed, some developing, etc.
Some use of IT
Some customer oriented tourism
Some increase in promotional activities
Less time availability
Tourist Demanding
Short tours
All Season Tours
Business, Conferences, Friends
More spending
Value for Time and Value for Money
Information on brochures
Government taking measures to attract tourists

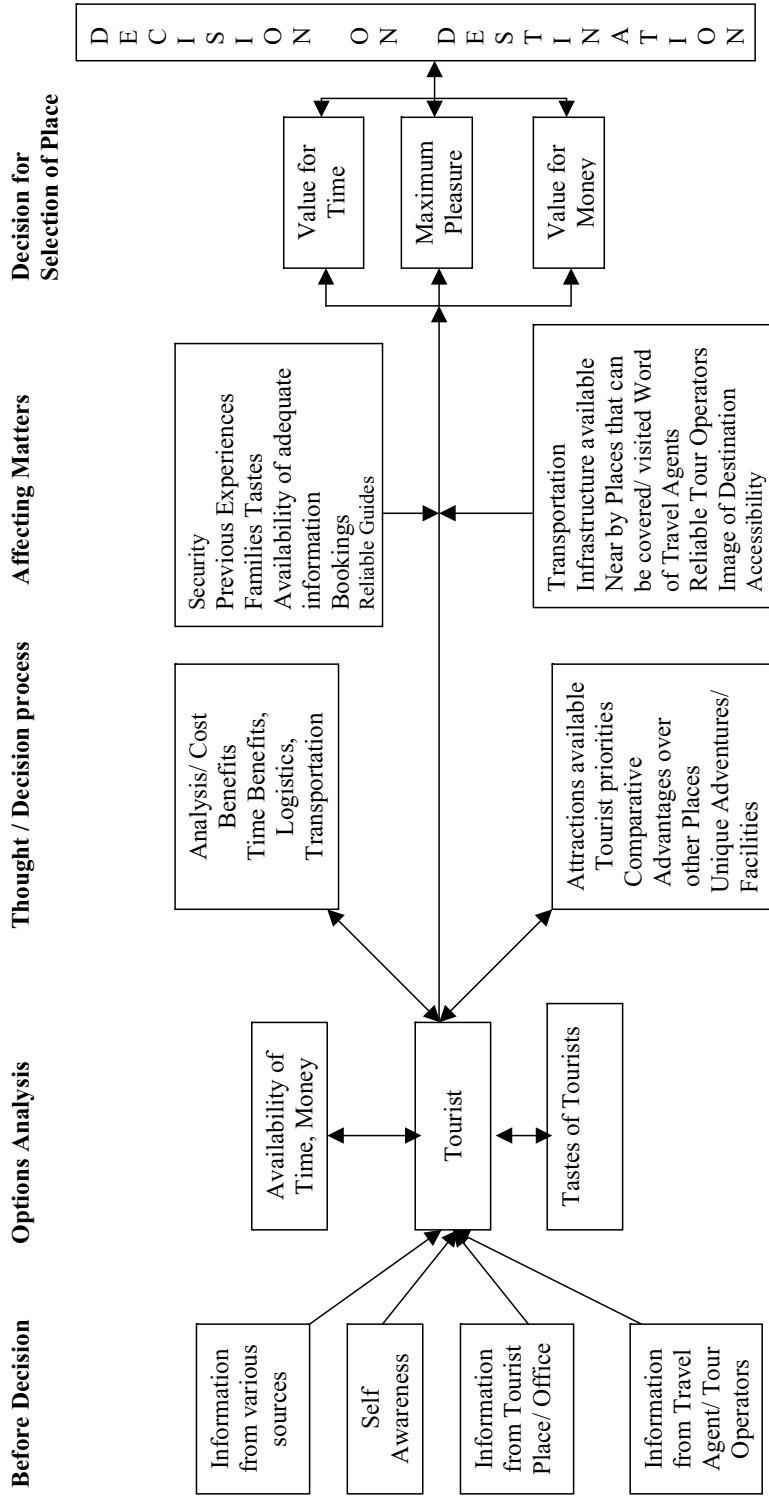
After

Security threat for 2-3 years
Implement Tourism Policy
Tourism on tastes of Tourist
Para gliding, Para Sailing, Air Balloons,
Further Segmentation
Initially Low tourist inflow then tourism Boom
Implementation & modifications of Perspective plan
High connectivity
Less time to visit destination
Connectivity through air, helicopters
Competition from neighboring Districts/ States
Large number of destinations to visit
Largely developed, some developing, all potential sites exploited, etc.
High use of IT, online booking, online trading
Fully customer oriented tourism
Increase in promotional activities
Very Less time availability
Tourist Demanding and challenging
Very Short tours
All Season Tours, Weekend tours
Business, Conferences, Friends
High spending
Value for Time and Value for Money
Information of kiosks, websites
Government' Approach Professional as care taker and as businessmen

Figure No.3
SWOT ANALYSIS FOR TOURISM IN J&K

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Rich Culture, Heritage • Three distinct Regions with diversity • Ladakh, Jammu, Kashmir • Flora, fauna, lakes, mountains, pilgrimage places, springs, palaces, monuments, horticulture, handicrafts, shawls, • Kashmir The Heaven, Switzerland of India/ Asia • Kashmiris are hospitable, hospitality in their nerves • Various kinds of tourism available to be exploited • Local People experienced due to past tourism booms • High Awareness of J&K as Tourist Paradise 	<ul style="list-style-type: none"> • No tourism Policy • Undeveloped Destinations • No proper/ Poor connectivity • Low awareness level • Low/ Poor promotional activities • Less Government Spending • Economy dependent on Tourism • Poor Coordination between departments • Stress only on few developed sites • Low time spending • No diversion of tourists from specific tourism to other type of tourism. • Less tourists diversion to new places • No Tourism research • No capacity building of stakeholders for better services • Lackadaisical Approach of Government • Complacency and non customer friendly. • No culture of Perspective Planning in State Department • No Accountability in Financial Matters & Services • Lack of Training Infrastructure & Hospitality Industry
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Can cater to almost all Tourist Tastes • High Returns from Tourism Industry • Development of Circuits • Un exploited Ladakh • Pilgrimage Circuits • Package Tours • Higher spending of people on recreation, entertainment • Linkage with specific circuits in other states • Professional approach • Governments role as Care taker and facilitator • Customer oriented and friendly 	<ul style="list-style-type: none"> • Security • Competition • Diversion of tourists to other safer places • Better facilities from competitors • Low information dissemination, access and training • Non awakening of Government, complacency • Non treatment of tourism as service industry

Figure No.4
STAGES/ FACTORS IN SELECTING A TOURIST PLACE BY A PROSPECTIVE TOURIST



TOURISM POLICY

Background

When tourism provides a major share of revenue to the State, the government has yet to put into writing its stated policy on tourism. The consultants failed to get such a statement for this study. Current activities for the promotion of tourism are well merited, but in the absence of a charter of objectives these activities have remained in isolation and lacked in energy.

While preparing this Report, the consultants have taken into consideration seven key areas that would provide standards for tourism development in the State of Jammu and Kashmir, Inspiration is taken from the National Tourism Policy which was approved by the Parliament in the first week of May this year (2002). To recall these key areas for examiners of this Report, the consultants inform that the seven key areas are Swagat (welcome), Soochna (information), Suwidha (facilitation), Suraksha (safety), Sahyog (cooperation), Samrachna (infrastructure development) and Saphai (cleanliness).

When these recommendations were examined by the consultants it was found that the situation in the State of J&K was failing to show even acceptable minimum standards. Therefore, keeping these considerations for future the efforts would be to provide adequate thrust to schemes, which will swing the State towards reaching a model administration and boost tourism.

In the suggestions of the consultant, there is no specific mention of the seven “S,” yet each of the proposal attempts to engrain the principle of these identified key areas on which, there can be no two views otherwise. It thus means, that if the State Government has agreed to accept any of the proposals for active consideration and realised them on ground, or advocated the same with the Central

Government forcefully for acceptance, this in a fact, would be seeking the implementation of the national tourism policy which has been accepted at the Centre.

The Consultants feel that there are adequate opportunities available in the existing State infrastructure to telescope the proposals and findings, into what already exists on ground.

Present Structure of Directorate of Tourism

The State Government of J&K has a Directorate of Tourism, which is headed by the Commissioner (Tourism) with the entire control of support services, which administer the functioning of the various tourists services in the State.

In the Executive Wing there is a Director General of Tourism while on the business wing an autonomous organization has been created called the 'JK Tourist Development Corporation' which also helps the State Government to get commercial loans from the market and undertake commercial activities which a Government department undertaking similar work would not be able to do so because of restrictions it passed under financial rules.

The Directorate of Tourism is amongst the original departments of the Government and is atleast 50 years in existence.

Tourism was considered a 'trade' activity in the State Government until now and only in May 2002, the Department of Industries agreed to recognize 'tourism' as an 'industry'. This happened on the eve of VISITE 2002.

Proposed Tourism Policy

Tourism in the last five decades had provided good sustenance to the local population and revenue to the State exchequer. As tourism was directly related to the index of public tranquility and law and order, the revenue to the State from this Government activity saw 'high' and 'lows'. The

existing arrangement has thus been a delicate arrangement in the absence of an alternate source of substantial revenue which otherwise should have come from industrial activities.

The Valley of Kashmir has no industrial base and past efforts to attract small and medium scale industries have failed. This has been due to two reasons namely the uncertain law and order situation, which has kept private funds away from the Valley from being invested and again the lack of managerial skills of the local population, which have invariably led to the failure of enterprises which were started in the Valley.

The situation is different in Jammu where sizable industrial activity does help in revenue generation through excise realisation and related activities.

In Ladakh again because of scarcity in power energy, no industrial activity exists. As this area is isolated from the effects in the Valley, development of tourists activities in this area has shown an uninterrupted slow growth.

We feel that besides the development of tourism activities in the Valley, it is necessary for the State to have sustainable agro industries as support services to the tourist industry and for which special efforts need to be made. That road is still to be charted out.

We are now attempting to provide a statement of a vision, statement of tourism goals and a policy for the State Government, in the hope that using this as a base, the State Government may like to make a declaration of its tourism policy, as it desires to follow for future. Improvements are always welcomed and the consultants look forward to considerable improved and a clearer direction is such a statement where it is necessary.

TOWARDS A TOURISM POLICY

THE VISION

**TO MAKE THE STATE OF JAMMU AND
KASHMIR THE NUMBER ONE TOURIST
DESTINATION OF INDIA LEADING TO
SUSTAINABLE SOCIO-ECONOMIC
DEVELOPMENT OF THE REGION BY
CAPITALISING ON THE ABUNDANT
AVAILABLE NATURAL AND HUMAN
RESOURCES**

THE GOAL

- **TO REGAIN THE LOST GLORY OF FAMED HOSPITALITY AND SERVICE MAKING THIS THE MOST SOUGHT AFTER TOURIST DESTINATION OF INDIA**
- **ATTRACTING HIGH SPENDING INTERNATIONAL TOURISTS TO VISIT INDIA AND THIS REGION**
- **DEVELOPE OPTIMAL INFRASTRUCTURAL FACILITIES**
- **QUICKER ACCESSIBILITY, SAFER MANOUVERABILITY, LARGER REACH, EXCELLENCE IN HOSPITALITY AND SERVICE**
- **DEVELOP TOURIST DESTINATION FACILITIES OF INTERNATIONAL STANDARDS**
- **MOVE FROM SEASONAL TO PERENNIAL TOURISM**
- **MAKE WIDER USAGE OF INFORMATION TECHNOLOGY TO IMPROVE MEANS OF COMMUNICATION**
- **ORGANISE ECO-FRIENDLY ACTIVITIES**
- **BE THE FACILITATOR TO ENCOURAGE PRIVATE ENTREPRENEURSHIP IN THE INDUSTRY**

OBJECTIVES OF THE TOURISM POLICY

The objectives for any policy on tourism should be well designed and sharply focussed so that each of the provisions are clearly understood and implemented. The stated objectives should also be in simple language for widest appreciation and application amongst the personnel of the department.

The State policy on Tourism should act as motivator for the development of tourism, needs to have the following main objectives before it:

1. Promote the image of the State for domestic and international tourism as the best destination for travel experience.
2. Develop the basic infrastructure to attract this traffic.
3. Develop an environment of confidence in the visitor that he is fully protected in the company of hospitable hosts.
4. Develop a separate and exclusive sector of high quality tourist destination.
5. Develop Tourism as a growth platform.

The following are, the fundamental objectives for the State policy on tourism :

1. Tourism is a major industry in the State of Jammu & Kashmir. It has a multiplier effect in generating employment, creating economic growth and alleviating the level of poverty in the society of its jurisdiction. Tourism must, therefore, be governed by professional conduct and by professionally trained state officers.
2. It shall be the objective of the State government to work as a growth engine to create proper policies and push the agreed projects to their fulfillment.
3. The State shall not work as a competitor in the business of promoting tourism or conducting trade. It shall, however, create such instruments of legislation and practices which will in turn ensure the safety of the visitors to the State and ensure fair practices in business.

4. The State encourages the pivotal role of private enterprise in generating goodwill for the people of the State amongst the visiting tourists.
5. The State shall endeavour to use the activities generated by tourism for benefiting its citizens and undertake such projects which would be in line of any welfare state and also mentioned as role models for other governments.
6. The State shall undertake to ensure that all practices encouraged by it or initiated in the private sector shall be environment friendly and do not violate good taste and cultural traditions of the people of the region.
7. The State shall ensure the proper well-being of all visitors and allow them access to the natural assets of its territorial jurisdiction and ensure that no activities are organized in the state which violate accepted norms of religious practices and Indian traditions of hospitality.
8. The state shall further ensure to provide correct information on all its tourists assets and create an environment of cleanliness which is commensurate with the Indian traditions of thrift.
9. The state shall ensure that by legislation and enforcement all visitors to it shall be protected from harm, capacious conduct and fraudulent practices.

The above stated policy statements should provide enough directions to the stated policy on tourism and all future programmes contemplated, must fall in these parameters.

10. The Directorate General of Tourism should remain as the nodal agency to formulate the scheme / plan for examination and approval in the State Government. The consultants view is that references moving out of the office of the Director General of Tourism into the State Secretariat are not attached any priority and sometime the references may not be even reviewed at sufficiently high authority and are often dealt merely at the desk stage.

As the objective of this perspective plan is to make tourism a growth platform,

11. It is necessary that the State Government also accepts the preposition that it shall endeavour to maintain a clear direction in all its future activities in realizing the tourist potential of the State resources to the maximum.

12. It is the view of the consultants that the policy on tourism should always be kept at the reality level and accept the limitation of its environment and area. Projects which may hold attraction in any other part of the world should not be grafted locally in the State without a deep analysis of their effects. Mere enthusiasm, therefore, is not sufficient and there ought to be within the State a mechanism of periodical review and analysis which is not influenced by personalities of the time, or the persons of authority. Such audit is first necessary for acceptance and to be carried out honestly by organizations or persons of known integrity, preference being given to such auditors available within the State otherwise from within the country. The consultants hold the view that if such fair practices are not encouraged and attempted, the present status-quo noticeable within the tourist industry of the State may not change.

The State policy on tourism is to be developed as an integrated activity involving the participation of local tourist tradesmen, trade organizations with national and international agencies.

The State policy on tourism must recognize one unique feature existing which no other State of the Union exhibits, namely, that the three known regions of Ladakh, Jammu and Srinagar, have separate entity, and thus have very clear three pre-dominant types of tourism. A general policy on activities in tourism initiated on the basis of data collected from one region will not necessarily find proper implementation, and result in failure. The foreigners' distinct preference for Ladakh is as commensurate as the Hindu tourists undertaking religious tourism in Jammu in very big numbers; the

nature lover is showing a clear preference for visiting Kashmir and is a mix of both Indian and foreign nationalities.

The State policy on tourism needs to recognize that placed as the State is, the industry must not depend upon international tourism which is subject to all types of international, political intrigues and pressures. Instead, the State policy on tourism must concentrate on domestic tourism wherein it should again emphasize on an age group between 20 years and 35 years slab to ensure that this youthful tourist will visit the State more than once in future.

Currently the responsibility to promote tourism in the State rests in the office of the Directorate General of Tourism, Jammu & Kashmir Tourism Development Corporation and the Department of Tourism. All the three agencies are manned by persons who are declared government servants. They are basically shuffled around and follow the routine of transfers and postings controlled by the State Secretariat. Less by practice and more by accident, officers dealing in tourism get exposed to practices and processes outside the State and, therefore, there is a discernible lack of professionalism in the working of these departments.

Political whim and less political will, governs the State policy on tourism. This is fatal to perspective planning. The consultants feel the need to impress that political whims would need to be removed in all activities in which the Central Government desires to support tourism projects and activities in the State of Jammu & Kashmir. The emphasis is that in such perspective planning is new areas need to be opened up for economic development which will then leave the visitors to enter the same areas and may not be subject to the harsh vagaries of isolation and deprivation of temporary state.

The consultants have gone into the functioning of the J&K Tourism Development Corporation and found that its current balance-sheet speaks of good returns. This is an artificial situation as all the

residential establishments owned by the Corporation are being used to provide housing to the paramilitary forces of the Central Government and there is 100% occupancy on record which is the main-stay in the revenue of the Corporation. In the event of any such premises being vacated by the paramilitary forces, the Corporation will not be able to offer the same premises to tourists because these premises have been thoroughly abused by their last occupants and they would need to be demolished.

The consultants, therefore, recommend that the J&K Tourism Development Corporation be advised to shrink its activities in such manner as to shed away its non-recoverable estates and sell it off to private enterprises. It should also begin thinning its staff liabilities, retaining only such persons who may be empowered with enforcing powers as well as keep experts on its roll who will have the powers to review all its projects being submitted by the private sector and lay out guidelines for the tourist trade sectors to follow and also organize inspections to ensure that minimum standards of cleanliness, sanitation, safety, facilitation and welcome in establishments exists for the visitors. Where areas of omission in servicing are identified, the Corporation should recommend penal action against the offenders and the action would be undertaken by the enforcement police which is already in existence under the model legislation.

It is here that the objective of the State policy on tourism that, the State shall not be in competition with the private sector is discernible. The State will keep its word of being a facilitator and catalyst in the promotion of tourism as an industry, a role which has been assigned under the objectives stated herein.

The second agency for the promotion of tourism is the Directorate of Tourism. Under current practice, it is the one agency which oversees a vast area of developmental activities, day to day husbanding of tourism activities by concerned departments and also undertake the enforcement of the

legislated State Act which protects tourists from all types of exploitation. As per current practice the office of the Director General, Tourism is not undertaking activities of enforcing laws protecting tourists. The police force assigned such tasks is diverted to other activities, which are not related to the interests of the visiting tourists.

The office of the DG, Tourism is also starved of funds. This is because the current focus of the State Government is on public order and the State tourist industry in the Kashmir Valley in particular is not generating sufficient funds to encourage future growth. Revenue from the Ladakh and Jammu regions is still coming, but less due to the efforts of the local State machinery and more so, because the visitors themselves have flung themselves into these regions in their great enthusiasm to have new experiences.

As facilitators and catalysts, the consultants see the role of the office of the Director General of Tourism to work on fundamental projects, which will generate future revenue as well as open up new territories. It is felt the DG, Tourism should play a leading role in proposing and monitoring primary infrastructure for the growth in tourism in the State, be the nodal agency for attracting private capital into the industry, create new markets in the industry as well as offer State investment into critical areas of growth which will further attract private capital and investment.

The office of the Director General of Tourism should also be the motivator in developing centres for basic training and higher learning on the tourist industry and economy as well as be the principal coordinator for all activities, which are providing support services to tourism.

The consultants recommend the down-sizing or alternately diverting the current activities of the State Government which are wholly related to the promotion of tourism and its support services but are presently concentrated in the Departments in the Secretariat.

Activities of other departments, such as, the Department of Horticulture, the Department of Culture and Fine Art, the Department of Archaeology, should all be adjuncts to the office of the Director General of Tourism and not under the Commissioner's office of Tourism.

The consultants recommend the need to inculcate more professional activities in this sphere of current government business which is very neglected, poorly overseen and staffed by persons who are considered after as in not sufficiently adept administration.

The consultants recommend that the post of Commissioner, Tourism be replaced by a new machinery which should be autonomous in its functions, transparent in its policies and be headed by the Chief Minister who shall also be assisted by a set of experts in their respective fields of professionalism.

In an ideal situation, the view is that the tourist industry of the State of Jammu & Kashmir, when properly managed and placed in an honorable situation, can regain its paramount position as the model industry in India for any State, from its current near bottom position, which it can, with good purpose and intends, regain its first position within the next six or seven years, if not earlier. The cost of recovery is not high because the basic infrastructure only requires repairs and not re-construction. What is otherwise required is a drastic process of filtering away the persons of non-professional working hands which abound in the present State tourism departments making it a liability in bureaucracy and which do not allow the release of funds for developmental activities, instead all recovered revenue in taxes is being disbursed in pay and maintaining establishments and even Central grant when handed over to the State Government for specific projects are moving into paying the essential salaries to the staff on government rolls.

The current strengths of the tourist economy in the State of J&K as discernible from the surveys conducted are –

- Extraordinary scenic beauty.
- Large domestic market
- Hospitable hosts

The weaknesses of the current economy are -

- Weak private service sector,
- Poor communication systems,
- Weak political commitment,
- Lack of awareness on tourist potential outside the State,
- Unpredictable transport system,
- Lack of skills in the available service sector,
- Lack of private finances in developmental activities,
- Heavy tax burden on entrepreneurs,
- Lack of enforcement machinery to ensure tourist safety,
- Insufficient power resources to generate industrial activities.

In the 20 year perspective planning, there is a win-win situation, provided the intent of the State is clear to see a parading shift in its current environment of work and practices. Elsewhere the consultants have already identified an exclusive traffic of tourists reaching two million persons passing through Srinagar airport in the year 2020. This is exclusive of ceiling of ten million domestic tourists who may swarm, in the assessment, of the consultants to various religious sites in Jammu region by 2016 AD and which may threaten to break down all existing infrastructure of public services in that area if the

State Government does not begin planning for reasonable restrictions to keep this traffic down to a reasonable seven million persons visiting Jammu region each year. Therefore, the consultants identify the opportunities in the development of the tourist industry in the State as under :

1. Develop a major infrastructure of service providers in the private sector.
2. Develop sustainable safeguards against the negative effects of tourism.
3. Position itself as an international hub of tourist traffic in South-Asia providing alternate site to Singapore's present position.
4. Absorb the entire lot of unemployed persons into positive trade activities, micro industries, as well as revive traditional handicraft industry.

In our perspective planning, the consultants see very few areas of threat to the State tourist industry. The most important negative factors which are identified are perhaps also too well-known already and they are, namely, -

1. The international political environment which makes this area the cockpit of future conflicts.
2. Environment degradation, particularly, future identified scarcity of drinking water.
3. Uncontrolled invasion of tourists because of unforeseen positive development in the industry.
4. Competitions from future destinations in the vicinity.
5. Unforeseen and unpredictable political environment domestically.

The threats to long term perspective planning are otherwise real. It is for this reason alone that the Central Government in recent years has earmarked developmental finances for the region and yet not handed over the money to the State Government and announced resources to undertake developmental work activities in the region which should help the State of J&K to also benefit from such Central projects. Mention may be made of the railway line project which in the past had been

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receiving scant attention. The Kargil conflict put that growth on a hold and made this State to be reviewed from its strategic perspective afresh. The result was that the Central Government has announced a new economic package for the development of the rail link on high priority, the construction of a second trunk road link in the State - Batote-Kishtwar-Simthin-Duksun-Anantnag route - which are projects where funds are not coming into the State but yet the completion of these projects promise a substantial economic activity in reconstruction and fundamental new developments.

Implementation of State Tourism Policy

Please Refer Chapter **VI** for the detailed recommendations on the Implementation of State Tourism Policy, STRB, etc.

SURVEY FINDINGS

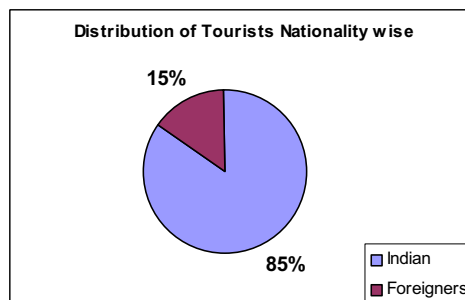
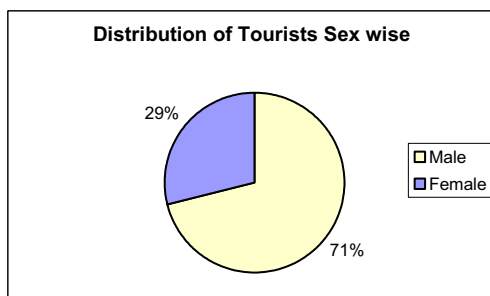
Survey was undertaken in the state of Jammu & Kashmir for the development of the perspective plan and to have first hand information from various stakeholders at various levels. The survey was undertaken in all the three regions of the state so as to have a fair picture of the status of tourism, requirements for the development of tourism, potential of tourism, etc. The main focus was to have the information from the grassroots people who are directly or indirectly related to the tourism industry as such. We are presenting the survey findings for the different regions separately and also for various stakeholders separately, as we foresee that there is a remarkable difference in these regions and each region has to be dealt with separately but in a coordinated manner and in synergy, for the overall development of the state and regions.

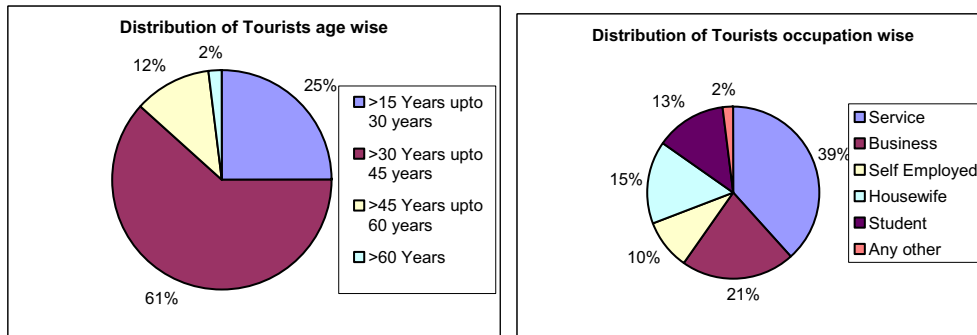
SURVEY FINDINGS (TOURIST)

KASHMIR

Tourist Profile

In Kashmir region, around 52 tourists were interviewed, out of total tourists 71.15% were males and 28.85% were females. Among the total interviewed tourists 84.62% were Indians and 15.38% were foreigners. It is found that in the present security environment mostly the youth or the middle aged males are visiting the Kashmir region, Majority (61.54%) of tourists were in the age group of >30 years and 45 years, 25% of tourists were in the age group of >15 years and 30 years, 11.54% were in the age group of >45 years and 60 years and rest 1.92% were of >60 years age. 38.46% tourists visiting Kashmir region were having the occupation of service, 21.15% tourists were businessmen, 15.38% were housewives, 13.46% were students, 9.62% were self employed.





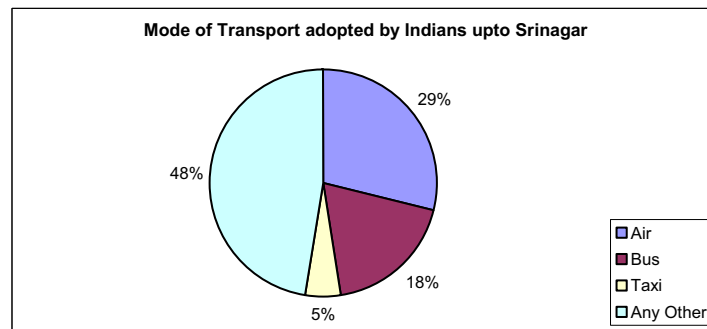
Mode of transportation adopted

By Foreign tourists

Foreign tourists visiting Kashmir mainly come by airways or bus. 57.14% of interviewed foreign tourists arrived in valley by bus whereas 42.86% foreign tourists arrived by aeroplane. Most of the tourists arrived here were coming from Delhi, either they came to valley via Jammu or came directly from Delhi.

By Indian tourists

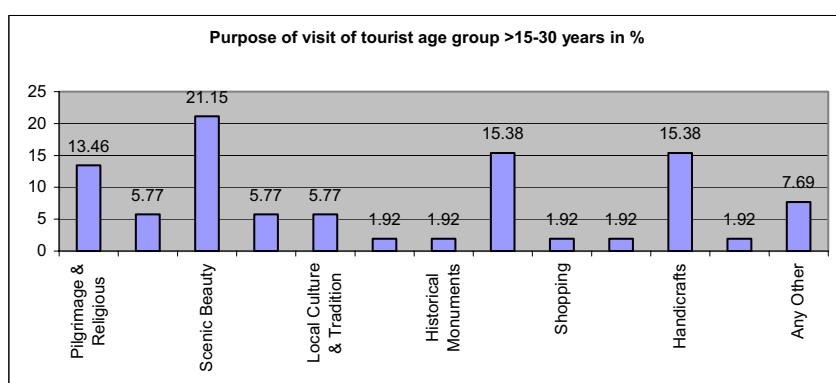
It is found that Indian tourists opt different mode of transportation to arrive in valley. 28.95% of tourists came to valley by aero plane, 18.42% of interviewed Indian tourists arrived in valley by bus, 5.26% said that they arrived by taxi. 47.37% of tourists said that they arrived in valley by other mode of transportations these were mostly the Tata sumo which were operating on fair share basis from Jammu to Srinagar.



Purpose of visit of tourists

In valley, tourists of different age groups come from different corners of world having different tastes. To understand the purpose of visit of tourists coming from different corners and of different age group, tourists were asked about their purpose of visit.

Kashmir is famous for its natural beauty but tourists visit this beautiful state too for various kinds of other attractions. Tourists gave multiple response for the purpose of their visit. In 22.54% responses tourists said their purpose of visit is to enjoy the scenic beauty of J&K, 17.34% of responses were for religious work and pilgrimage. In 16.76% of responses tourists said that their purpose of visit is to take part in picnic. In 11.56% of responses tourists said that their one of the purpose to visit J&K was the availability of handicraft materials. In 6.94% responses tourists said that there purpose of visit is to see the historical monuments, 4.05% each responses were for forest sanctuary and wild life and business and professional requirements of tourists respectively, 3.47% responses were for shopping. In 2.89% of responses tourists said that there purpose of visit is trekking, In 2.31% of responses tourists said that their purpose of visit is to experience local culture and tradition of the J&K. 1.16% responses each were for water sports, for museum, for trout fishing, for meeting friends and relatives. 0.58% of responses were for fairs and festivals.

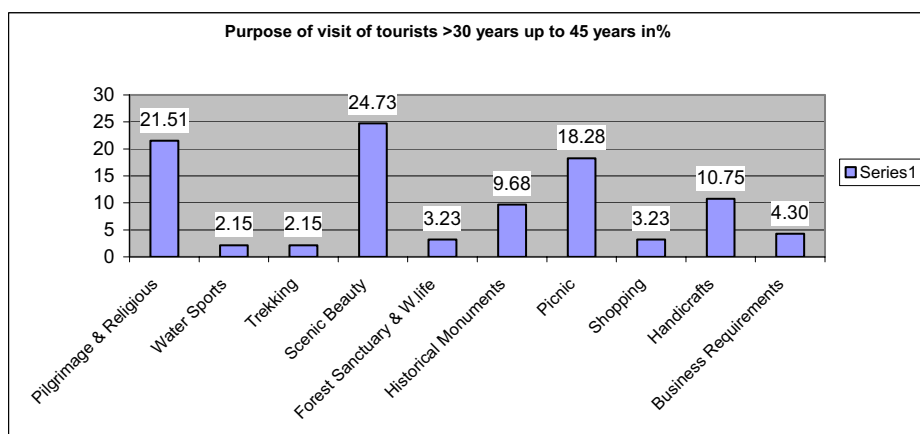


Tourists > 15 and up to 30 years of age

Among tourists of > 15 and up to 30 years of age in 21.15% responses tourists said that they have come to enjoy the scenic beauty of the valley, in 15.38% responses each of tourists of this age group said that they have come for picnic and handicraft materials. In 13.46% responses tourists of this age group said that they have come for pilgrimage and religious work. In 5.77% responses each said that they have come for trekking, to see forest sanctuary and wildlife, to experience local culture and tradition respectively. In 1.92% responses each said that they have come for museum, historical monuments, shopping, trout fishing and business requirement respectively and rest 7.69% have come for other reasons.

Tourists > 30 and up to 45 years of age

Those tourists who were interviewed in the age group of >30 up to 45 years, in 24.73% responses tourists said that they have come for the scenic beauty of valley, 21.15% responses were for pilgrimage and religious work. In 18.28% responses tourists said that their purpose of visit was picnic, In 10.75% of responses tourists said that they have come for handicrafts, 9.68% of responses were for historical monuments, In 4.30% of responses tourists said that their purpose of visit was business requirement. In 3.23% responses each of interviewed tourists said that their purpose of visit was to see forest sanctuary and wild life, and to enjoy picnic respectively. 2.15% each of responses were for trekking and water sports.



Tourists > 45 and up to 60 years of age

Total 24 responses obtained from tourists of > 45 and up to 60 years of age. In 16.67% each of responses tourists of this age group said that they have come for scenic beauty of the valley and to see the historical monuments of this region. In 12.51% of responses tourists of this age group said that their purpose of visit is pilgrimage and religious work. In 8.33% of responses each said that they have come for their business and professional requirements and to meet their friends and relatives. In 4.17% responses each of interviewed tourists of this age group said that they have come for forest sanctuary and wild life, local culture and tradition, museum, historical monuments, shopping, trout fishing, handicrafts and fairs and festivals and rest 4.17% had other reasons of their visit.

Above 60 years

Out of total respondents one-fourth said that their purpose of visit was to see scenic beauty of Kashmir, historical monuments, to do shopping and their business requirement.

Revisit by Tourists in Kashmir valley

It is observed that in present security environment tourists are not revisiting the Kashmir valley, most of the tourists who were interviewed were visiting valley first time. 82.35% of tourists said that they have come to Kashmir first time; only 17.64% tourists said that they are revisiting the place. Only 3.92% of tourists said that they have already visited the place twice before. 13.73% of tourists said that they have visited Kashmir more than 4 times before, this is found that among those tourists who had visited Kashmir four times before most of them were visiting for their business or professional requirements

Duration of stay age wise

To understand the duration of stay of tourists of different age group, sex, nationality, tourists were asked to tell about there total number of days spent or planning to stay in the region.

Tourists> 15 and up to30 years of age

In the age group >15and up to 30 years 30.77% tourists said that that there duration of stay was of 3 to 7 days. 23.08% each said that there duration of stay was 18 to 22 days and 30 days and above respectively. 7.69% each said that there duration of stay was of below 3 days, 8 to 12 days and of 23 to 29 days respectively.

Tourists> 30 and up to 45 years of age

Majority of respondents of this age group (78.13%) said that there duration of stay in the region was of 3 to 7 days. 18.75% respondents said that there duration of stay was of 8 to 12 days. Rest 3.13% of respondents said that there duration of stay was of below three days.

Tourists above 45 years of age

Majority of respondents of this age group (57.14%) said that there duration of stay in the region was of 3 to 7 days. 14.28% each said that there duration of stay was of 18 to 22 days and 23 to 29 days and 30 days and above respectively.

Likely revisit by tourists to J&k

Majority of interviewed tourists said they would revisit Jammu & Kashmir in future.

All of the tourists in the age group of >15 years and up to 30 years said that they would like to revisit Jammu & Kashmir. 90.7% of tourists in the age group of >30 years and up to 45 years said they would like to revisit Jammu & Kashmir. 85.7% tourists of above 45 years of age said that they would like to visit the valley again.

94.6% males said that they would like to visit the valley again. 86.67% of females said they would like to revisit the valley again.

Persons accompanying tourist

To know about the number of persons accompanying the tourist in their visit to J&K of different age group, sex, nationality, tourists were asked to tell about the number of persons accompanying the tourists in their visit to J&K.

28.85% of tourists were visiting valley alone, 42.31% of tourists were visiting the valley along with one person. Two persons accompanied 13.46% of tourists, 11.54% of tourists were accompanied by three persons, 1.92% of tourists were accompanied by four persons, rest 1.92% tourists were accompanied by more than four persons.

More than half of tourists (53.85%) in the age group of >15 years and up to 30 years were visiting the valley alone, 38.46% tourists in this age group were accompanied by one person, 7.69% tourists were accompanied by two persons in there trip.

More than half of tourists (53.85%) in the age group of >30 years and up to 45 years were traveling to Kashmir valley with one person, 5.63%each in this age group were traveling alone or traveling with three persons, 3.13% of tourists in this age group were traveling with more than four persons.

42.85% of tourists of above 45 years of age traveling alone in the valley. 28.57% tourists said that they were accompanied by two persons. 14.28% each said that they were accompanied by 3 persons and 4 persons respectively.

32.43% of males were visiting the valley alone, 37.84% of males were accompanied by single person, 13.51% of males were accompanied by three persons, 10.81% of males were accompanied by two persons. 2.70% each said that they are visiting with four persons and more than four persons respectively. 20% interviewed female tourists said that they are touring the valley alone, 53.3% of female tourists said that they are traveling in the valley with a person. 20% female tourists said that they are traveling with two persons rest 6.7% of tourists said that they are traveling along with 3 other persons.

Purpose of visit of tourists

Gender wise

Total 127 responses were obtained from male and total 46 responses obtained from the female respondents. In 22.83% responses male tourists said that their purpose of visit was to see the scenic beauty of J&K, similar to male tourists responses 21.74% responses of female tourists were also for scenic beauty but at the same time in other 21.74% female responses they said that their purpose of visit is pilgrimage and religious work.

Daily Spending pattern of tourists

Age wise

It is observed that majority of young tourists like to spend minimum during their tour. 69.2% of tourists in the age group of >15 and up to 30 years said that they spend up to Rs 500 daily during the tour. 15.4% tourists in the age group of >15 and up to 30 years said that they spend in between Rs 500 and Rs 1000, similarly 15.4 % of tourists in the age group of >15 and up to 30 years said that they spend in between Rs 1000 and Rs 1500 daily.

37.5% of tourists in the age group of >30 years and up to 45 years said that they spend in between Rs 500 and Rs 1000 daily in the tour, 31.3% of tourists in the age group of >30 years and up to 45 years spend up to Rs 500 daily during the tour. 15.6% each of tourists said that they spend in between Rs. 1000 and Rs 1500 daily in the tour and in between Rs. 1500 and Rs. 2000 respectively.

Daily spending of tourists of >45 years is found higher compared to other age groups, 56.7% of tourists of >45 years spend in between Rs 500 and Rs. 1000 daily in their tour to J&K , 33.3% tourists of >45 years said that they spend in between Rs. 1500 and Rs. 2000 daily in their tour, rest 10% said that they spend up to Rs 500 daily .

Gender wise

40.54% of male tourists said they spend up to Rs 500 daily in J&K, 35.14% of male tourists said they spend in between Rs 500 and Rs 1000 daily in J&K. 10.81% each male respondents said they spend in between Rs 500 and Rs 1000 and in between Rs 1000 and Rs 1500 daily here in J&K.

33.33% each of female tourists said they spend up to Rs500 and in between Rs 500 and Rs 1000 daily in J&K, 20 % of female tourists said they spend in between Rs 1000 and Rs 1500 daily in J&K.6.67% each female respondents said they spend in between Rs 1500 and Rs 2000 and in between Rs 2000 and Rs 2500 daily here in J&K.

Tourist's opinion on the quality of Infrastructure

Air and Airport Services -Some tourists said that the air services and airport services of Srinagar are good only a few said that the air services and airport services of Srinagar are bad.

Taxi services-More than half of interviewed tourists said that the Taxi services in Kashmir is good. 15.56% of tourist said that taxi services of Srinagar is very good. 24.44% of tourists said that the taxi services is average. 2.22% of tourist said that this is very poor.

Bus services- 55.17% of tourists said that bus services in Kashmir is good, 24.14% of tourists said that the bus services in Kashmir is average. 10.34% of tourists said that this is very good. 3.45% each said that this is poor and very poor respectively.

Hotels-All of respondents said either said good or very good in the existing hotels in Kashmir.

Shikara _All of the respondents either said good or very good quality of the shikaras

Houseboat-All of the interviewed tourists either said good or very good quality of the houseboats

Restaurants-Majority of tourists (68.89%) said that the restaurants are good and 15.56% said that the restaurants are very good. Other 15.56% said that the restaurants are average.

Markets and shopping facility-Majority of tourists said that shopping facility is good. 24.44% said that market and shopping facility is average

Tourist guides-33.33% of tourists said that the tourist guides are of average quality. 23.08% said that guide services is of poor quality. 7.69% of tourists said that this is of very poor quality. Less than 24% said that guide services are of good or very good quality.

Wayside Amenities- 45.83% of tourists said that the wayside amenities are of average quality. 25% of tourists said that it is of poor quality, 4.17% of tourists said that it is of very poor quality only 14.5 % of tourists said that it is of good quality.

Roads-38% of tourists said that Roads are of average quality, 8% of tourists said that Roads are of poor quality, 2% said that Roads are of very poor quality. 50% of tourists said that Roads are of good quality.

Parking-46.34% of tourists said that parking facility is of average quality, 19.51% of tourists said that parking facility is of poor quality, 4.88% of them said that this is of very poor quality. Only 9.76% of tourists said that this is of good quality.

Local telephone – Majority of tourists said that local telephone facility is of good quality.

STD/ISD- At the time of survey STD/ISD services had been withdrawn by the government of India for J&K, so this facility was not available for tourists in that period of time.

Internet –Majority of tourists said that they have not used Internet facility because availability of Internet facility is poor.

Tourists on recommending others to visit J&K – Majority of tourists said that they would recommend others to visit J&K

Decision influenced by- 33.85% tourists said that friends and relatives influenced their decision to visit J&K, 20% tourists said that tour operator and travel agents influenced their decision to visit J&K, other 20% said that their decision is influenced by Book/Article/magazines.

Locations visited by the tourists

Majority of the tourists who visited Kashmir region visited Srinagar and there are other locations which tourists visited were the Pahalgam, Sonmarg, Gulmarg,

Things Liked by Tourists

Majority of the tourists said that they liked the scenic beauty of the region; tourists said that they liked the Mughal gardens, mountains Dal Lake. They said that they liked the Houseboats, Shikaras. Number of tourists said that they liked the climate of the region. Tourists liked the good behavior of the local people and they were very impressed with them and specially foreigners.

Things Disliked by Tourists

Tourists disliked the pollution in the region, they observed pollution in the Dal lake and they disliked that. Since at the time of survey STD/ISD facility was not there so people didn't like that. Tourists also disliked the local Bus services of Srinagar. Tourists also disliked harassment by shikara hawkers and Pony walas of Pahalgam. Lack of good Internet facility and Lack of credit card facility was also disliked by tourists

Suggestions given by the tourists

At the time of the survey STD/ISD facility was not available in the Kashmir so majority of tourists were suggesting for restarting the facility in the region. Their were other concerns of tourists they were very concerned for the pollution in the Dal lake. They were suggesting for cleaning the Dal lake. Tourists wanted to have more information regarding Kashmir and the tourists location in the region, they wanted to have better information center in the region for providing quality information to the tourists. Number of tourists suggested that their should be better Bus facility in the Kashmir region and particularly in the Srinagar. Tourists were very concerned about the environment of the region and they suggested that the environment should be protected and should be improved further in future. Tourists suggested for better security arrangement in the region so that tourists can move freely in the region.

SURVEY FINDINGS (TOURIST)

Jammu

Tourist Profile

In Jammu region total 111 tourists were interviewed, out of total tourists 86.49% were males and 13.51% were females. All of the interviewed tourists were Indians. (40.54%) of tourists were in the age group of >30 years and up to 45 years, 29.73% of tourists were in the age group of >15 years and up to 30 years, 12.61% were of up to 15 years and 15.32% were of >45 years and up to 60 years, 1.80% of tourists were of more than 60 years. 44.14% tourists visiting Jammu region had occupation in the services, 27.03% of tourists were businessmen, 11.71% were students, 8.11% were housewives, 7.21% were self employed. 1.80% were in any other kind of occupation.

Mode of transportation adopted

Majority of tourists visit Jammu by train, 84.54% of tourists came to Jammu by train, 9.28% of interviewed Indian tourists arrived in Jammu by bus, 3.09% each respondents said that they arrived by taxi and aero plane.

Purpose of visit of tourists

In Jammu tourists come from different corners of India to visit Vaishnodevi shrine. To explore the other reason of their visit we asked the purpose of their visit to J&K

Age wise

Tourists gave multiple responses for giving the idea about the purpose of their visit. In 22.54% responses tourists said their purpose of visit is to enjoy the scenic beauty of J&K, 17.34% of responses were for religious work and pilgrimage. This can be observed that high percentage of people also traveled for religious work and pilgrimage purpose. In 16.76% of responses tourists said that their purpose of visit is to take part in picnic. In 11.56% of responses tourists said that there one of the purpose to visit J&K is the availability of handicraft materials. In 6.94% responses tourists said that their purpose of visit is to see the historical monuments, 4.05% each responses were for forest sanctuary and wild life and business and professional requirements of tourists respectively, 3.47% responses were for shopping. In 2.89% of responses tourists said that their purpose of visit is trekking, In 2.31% of responses tourists said that their purpose of visit is to experience local culture and

tradition of the J&K. 1.16% responses each were for water sports, for museum, for trout fishing, for meeting friends and relatives. 0.58% of responses were for fairs and festivals.

Tourists up to 15 years of age

Among tourists up to 15 years of age in 60% responses tourists said that they have come for pilgrimage and religious work in Jammu, in 13.33% responses each of tourists of this age group said that they have come for picnic, to meet friends and relatives and scenic beauty respectively.

Tourists > 15 and up to 30 years of age

Among tourists of > 15 and up to 30 years of age, in 80.49% responses tourists said that they have come for pilgrimage and religious work, 7.32% each said their purpose of visit is to enjoy the scenic beauty and picnic in the Jammu region, in 2.44% responses tourists of this age group said that they have come for local culture and tradition. In 2.44% responses tourists said that they were in the state for monasteries. 7.69% of the respondents had any other purpose of visit.

Tourists > 30 and up to 45 years of age

Those tourists who were interviewed in the age group of >30 up to 45 years, In 73.68% responses tourists said that they have come for pilgrimage and religious work, 8.77% each responses were for the scenic beauty and picnic. In 3.51% each responses tourist of this age group said that their purpose of visit is trekking and business requirement.

Tourists > 45

Total 19 responses obtained from tourists of > 45 and up to 60 years of age all of the responses were for pilgrimage and religious work.

Purpose of visit sex wise

Total 107 responses were obtained from male and total 25 responses obtained from the female respondents. In 82.24% responses male tourists said that their purpose of visit is pilgrimage and religious work, similar to male tourists responses 60% responses of female tourists were also for pilgrimage and religious work. In 16% each of female tourists responded that their purpose of visit was to see the scenic beauty and to take part in the picnic. In 5.61% each responses male respondents said that their purpose of visit is to take part in picnic and to see the scenic beauty. In 3.74% responses male

tourists said that their business and professional requirement is their purpose of visit. In 1.87% responses male tourists said that their purposes of visit is to do trekking in the state. In 4% each responses female tourists said that their purpose of visit is to see monasteries and to experience local culture and tradition in the state.

Revisit by Tourists in Jammu

It is observed that in present security environment tourists are not revisiting the Jammu, most of the tourists who were interviewed were visiting Jammu first time. 69.16% of tourists said that they have come to Jammu first time; only 30.84% tourists said that they are revisiting the place. Only 9.35% of tourists said that they had already visited the place once before. 4.67% of tourists said that they had visited Jammu twice before. 0.93% of tourists said that this is their fourth visit. 15.88 % of tourists said that they had already visited Jammu more than four times before.

Among all the 30.84% tourists who said that they have revisited the Jammu before, In (82.85%) responses majority of them said that they have come for pilgrimage and religious work, in 12.12% responses tourists said that they have revisited for business and professional work. In 2.85% each responses tourists said that they have revisited Jammu for scenic beauty and picnic respectively.

Duration of stay

To understand the duration of stay of tourists of different age group, sex, nationality, tourists were asked to tell about their total number of days spent or planning to stay in the region.

72.07% of interviewed tourists said that their duration of stay was of 3 to 7 days rest 23.42% of tourists said their duration of stay was of below 3 days

Age wise

Tourists > 15 and up to 30 years of age

In the age group >15 and up to 30 years 81.82% tourists said that their duration of stay was of 3 to 7 days rest 18.18% said that their duration of stay was of below 3 days

Tourists > 30 and up to 45 years of age

Majority of respondents of this age group (75.56%) said that their duration of stay in the region was of 3 to 7 days, 22.22% respondents said that their duration of stay was of below 3 days only 2.22% respondents said that their duration of stay was of 8 to 12 days.

Tourists above 45 years of age

Majority of respondents of this age group (68.42%) said that their duration of stay in the region was of 3 to 7 days. 26.31% said that their duration of stay was of below 3 days and 5.26% of the tourists said that their duration of stay was of 8 to 12 days.

Likely revisit by tourists to J&k

Majority of interviewed tourists said they will revisit the Jammu in future.

All of the tourists in the age group of >15 years and up to 30 years said that they would like to revisit the Jammu & Jammu. 95.56% of tourists in the age group of >30 years and up to 45 years said they would like to revisit the Jammu, only 4.44% of tourists in this age group said that they would not like to revisit the J&K. 89.47% of tourists above 45 years of age said that they would like to visit the Jammu again, only 10.52% of tourists of 45 years and above said that they would not like to revisit.

97.92% of males said that they would like to visit the Jammu again, but 2.08% of males said that they would not like to visit the Jammu again. 80% of females said they would like to revisit the Jammu again, but a considerably higher percentage (20%) of females said they would not like to visit the Jammu again.

Persons accompanying tourist

To know about the number of persons accompanying the tourist in their visit to J&K of different age groups, sex, nationality, tourists were asked to tell about the number of persons accompanying the tourist in their visit to J&K.

12.61% of tourists were visiting Jammu alone, 9.91% of tourists were visiting Jammu along with one person. 14.41% of tourists were accompanied by two persons, 15.32% of tourists were accompanied by three persons, 9.91% of tourists were accompanied by four persons, rest 37.84% of tourists were accompanied by more than four persons.

42.86% each in this age group said that they have come alone and accompanied by more than four persons respectively. 7.14% of tourists up to 15 years of age said that they are accompanied by one and two persons respectively. 24.24% of tourists in the age group of >15 years and up to 30 years were visiting Jammu with two persons.

21.21% of tourists in this age group were accompanied by three persons, 9.09% tourists were accompanied by four persons in their trip. 44.44% tourists in the age group of >30 years and up to 45 years were traveling to Jammu with four persons, 17.78% tourists in this age group were traveling with three persons, 13.33% of tourists in this age group were traveling with one person only. 11.11% tourists of >30 years and up to 45 years were traveling alone. 6.67% each of tourists >30 years and up to 45 years were traveling with two persons and four persons respectively. 31.57% of respondents of above 45 years of age said that they are accompanied by more than four people, 26.31% tourists of this age group said that they are accompanied by four persons, 21.05% tourists of this age group said that they are accompanied by two persons. 10.52% each respondents of above 45 years of age said that they are accompanied by three persons and traveling alone respectively.

37.50% of males were visiting the Jammu with more than four persons, 16.67% of males were accompanied by three persons, 15.63% of males were accompanied by two persons, 11.46% of males were traveling alone. 9.38% each of male respondents said that they are accompanied by one person and four persons respectively. 40% of female respondents said they are visiting Jammu with more than four persons. 20% interviewed female tourists said that they are touring Jammu alone, 13.33% each of female tourists said that they are traveling to the Jammu along with one person and with four person. 6.67% each female tourists said that they are traveling with two persons and three persons.

Spending pattern of tourists

This was observed that most of the tourists prefer to spend minimum in the state of J&K or in other word it can be said that most of those tourists visit J&K whose spending potential is less. In Jammu region 47.45% of interviewed tourists said that they spend up to Rs500 daily in their tour of Jammu, 41.44% of tourists said that they spend in between Rs500 and Rs1000 daily in this tour of Jammu, 9.01% said that they spend in between Rs1000 and Rs1500 daily. 0.90% each said that they spend in between Rs1500 and Rs2000 and in between Rs2000 and Rs2500 daily.

Age wise

Half of the interviewed tourists of up to 15 years of age said that they spend up to Rs500 daily in their tour of J&K other half of respondents said that they spend in between Rs500 and Rs1000 daily.

57.58% of tourists in the age group of >15 and up to 30 years said that they spend up to Rs500 daily during the tour. 36.36% tourists in the age group of >15 and up to 30 years said that they spend in between Rs500 and Rs1000, similarly 6.06 % of tourists in the age group of >15 and up to 30 years said that they spend in between Rs1000 and Rs1500 daily

53.33% of tourists in the age group of >30 years and up to 45 years said that they spend in between Rs500 and Rs1000 daily in the tour, 42.22% of tourists in the age group of >30 years and up to 45 years said that they spend up to Rs500 daily during the tour. 2.22% each tourists of >30 years and up to 45 years said that they spend in between Rs1000 and Rs1500 and in between Rs1500 and Rs2000 daily in the tour.

57.89% of tourists of >45 years said that they spend up to Rs500 daily in this tour of J&K. 31.57% of tourists of >45 years said that they spend in between Rs500 and Rs. 1000 daily in this tour of J&K , 10.57% tourists of >45 years said that they spend in between Rs. 1000 and Rs. 1500 daily in this tour

Gender wise

40.54% of male tourists said they spend up to Rs500 daily in J&K, 35.14% of male tourists said they spend in between Rs500 and Rs1000 daily in J&K. 10.81% each male respondents said they spend in between Rs500 and Rs 1000 and in between Rs1000 and Rs1500 daily here in J&K.

33.33% each of female tourists said they spend up to Rs500 and in between Rs 500 and Rs 1000 daily in J&K, 20 % of female tourists said they spend in between Rs 1000 and Rs1500 daily in J&K. 6.67% each female respondents said they spend in between Rs 1500 and Rs 2000 and in between Rs 2000 and Rs 2500 daily here in J&K.

Tourist's opinion on the quality of Infrastructure

Taxi services-More than half of interviewed tourists said that the Taxi services of Jammu is either good or very good. 34.18% of tourists rated the taxi services as average. 2.53% of tourists rated this as poor.

Bus services- 81.13% of tourists said that bus services of Jammu is good, 10.38% of tourists said that the bus services of Jammu is average. 8.49% of tourists said that this is very good. 3.45% each said that this is poor and very poor respectively.

Hotels-Majority of respondents said that the existing hotels of Jammu are either good or very good. 20.75% of respondents said that hotel of Jammu region is average.2.83% of tourists said that hotel of Jammu region is of poor quality.

Restaurants-Majority of tourists (60.27%) said that the restaurants are good and 15.56% said that the restaurants are very good. Other 31.51% said that the restaurants are average.

Markets and shopping facility-Majority of tourists said that shopping facility is good. 22.50% said that market and shopping facility is average.

Wayside Amenities-11.76 % of tourists said that wayside amenities are of good quality. **58.82%** of tourists said that the way side amenities are of good quality.18.82% of tourists said that it is of average quality, 8.24% of tourists said that it is of poor quality.

Roads-Majority of tourists said that road of Jammu is of good quality.

Parking-More than half of tourists said that the parking of Jammu is good tourists said.

Local telephone – Majority of tourists(71.08) said that local telephone facility is of good quality.

STD/ISD-majority of tourists(76.70%) said that STD/ISD facility of Jammu is of good quality.

Internet –Majority of tourists said that they have not used Internet facility because availability of Internet facility is poor.

Tourists on recommending others to visit J&K – Most of the interviewed tourists said that they would recommend others to visit J&K

Decision influenced by- 58.54% tourists said that friends and relatives influenced their decision to visit J&K, 28.76% tourists said that they had the prior information about the location.

Locations visited by the tourists

Those interviewed tourists who visited Jammu region almost all of them visited Jammu city and Katra.

Things Liked by Tourists

Those tourists who visited Jammu had the only aim was to visit the Vaishnodevi shrines, their faith out beats everything and they simply responded that they liked the Vaishnodevi Shrine, some of them said that they liked the arrangement done by the shrine boards for the pilgrims. Few tourists said that they liked the temples of Jammu. Tourists said that people of Jammu & Katra were cooperative

Things Disliked by Tourists

Tourists visiting Jammu identified number of things, which they disliked.

Tourists disliked the existing security climate in the region. Tourists also disliked the costly food and higher cost of other things, they also disliked the inadequate basic amenities of Jammu like toilets. Tourists disliked the bargaining by shopkeepers in the market place.

Suggestions given by the tourists

Tourists suggested that security situation in the Jammu region should be improved, they also suggested for the cheap accommodation to be made available. Tourists wanted more entertainment facilities in the Jammu region. Tourists wanted authorities to stop hawkers and others from harassing tourists.

SURVEY FINDINGS (TOURIST)

LADAKH

Tourist Profile

In Ladakh region total 95 tourists were interviewed, out of total tourists 58.95% were males and 41.05% were females. Among interviewed tourists 82.11% tourists were foreigners and rest 17.89 % tourists were Indians (49.47%) of tourists were in the age group of >30 years and up to 45 years, 36.84% of tourists were in the age group of >15 years and up to 30 years, 9.47% were of >45 years and up to 60 years, rest 4.21% of tourists were of more than 60 years.

26.32% tourists visiting Ladakh region were the businessmen, 24.21% of tourists were in services, 17.89% each were students and self employed respectively, 13.68% were in any other kind of occupation.

Foreign Tourists

Among interviewed tourists more than 88% tourists were in the middle age group. 41.03% of tourists were of >15 years and up to 30 years and 47.44% were >30 years and upto 45 years. Tourists belong to all occupation arrive in the Ladakh region.

Mode of transportation adopted

Majority of tourists visited Ladakh by aeroplane; all the foreign tourists said that they have arrived to this place by aero plane. 80% of Indian tourists said that they have arrived by aeroplane where as 20% of Indian tourists said that they have arrived by taxi.

Purpose of visit of tourists

In Ladakh tourists come from different corners of world to experience the cultural as well as scenic virgin beauty of the place. To explore the different reasons of their visit we asked the tourists to reveal the purposes of their visit to J&K.

Tourists gave multiple responses for giving the idea about the purpose of their visit. In 17.89% responses tourists said their purpose of visit is to see the monasteries, In 14.36% responses tourists said that they have come for trekking. In 10.57% of responses tourists said that their purpose of visit is to see the local culture and tradition of Ladakh. In 8.13% of responses tourists said that their purpose to visit Ladakh is to see the historical monuments. 7.59% responses were for museum, in 7.32% responses tourists said that their one of the purpose of visit is the available handicrafts in the region,

7.05% each responses were for pilgrimage and religious work and fairs and festivals respectively. In 6.50% of responses tourists said that their purpose of visit is to take part in the picnic, In 1.08% each responses tourists said that their purpose of visit is the forest and wild life and fairs and festival. 0.81% responses were for trout fishing, 0.54% each were for business requirement and water sports respectively. In 2.44% of responses tourists said they visited for other purposes.

Foreign Tourists

It was found that majority of foreign tourists mainly visit Ladakh region for the existing monasteries, trekking, local culture and tradition of the people, museum and historical monuments of the region.

In 17.98% responses foreign tourists said that they have come for the monasteries of the region. In 16.09% responses tourists said that they have come for trekking, 10.09% responses were for local culture and tradition of the region.

Age wise

Tourists > 15 and up to 30 years of age

Among tourists of > 15 and up to 30 years of age, in 15.28% each responses tourists said that their purpose of visit is trekking and monasteries. In 13.64% responses tourists said that their purpose of visit was to see the local culture and tradition of Ladakh region. 9.03% responses were for the available handicraft in the region. In 8.33% responses tourists said their purpose of visit is to see the fair and festival of J&K. In 7.64% responses each tourists said their purpose of visit is to enjoy the scenic beauty and to see the historical monuments in the Ladakh region. In 6.25% each responses tourists of this age group said that they have come for pilgrimage and religious work and to take part in the picnic respectively. 4.86% responses were for museum, 2.08% of responses for forest sanctuary and wild life. In 1.39% of responses tourists said that their purpose of visit to meet friends and relatives. In 0.69% each responses tourists said that their purpose of visit is water sports, shopping, and business requirement

Tourists > 30 and up to 45 years of age

Those tourists who were interviewed in the age group of >30 up to 45 years, on the basis of their response it was found that they mainly come for monasteries and trekking. In 19.02% responses tourists said that their purpose of visit was monasteries and 13.64% responses were for trekking.

In 8.52% each responses tourists said that they have come for local culture and tradition and museum respectively, 7.95% each responses were for Historical monuments and Fairs and festivals.6.82% each responses were for the Scenic beauty and Handicraft respectively. In 1.14 % each responses tourist of this age group said that there purpose of visit is meeting friends and relatives and shopping respectively.

Tourists> 45 up to 60 years

Total 33 responses obtained from tourists of > 45 and up to 60 years of age 24.24% responses of this age group were for monasteries and 12.24% each were for Scenic beauty and local culture and tradition.9.09% each responses were for museum and historical monuments in the region.

Tourist> 60 years

Tourists of this age group said mainly they have come for museum, trekking and other preferences were Monasteries, pilgrimage and religious work, historical monuments and picnic

Sex wise (Foreign tourists)

Foreign tourists of both sex said that main attractions for them are monasteries, trekking routs, local culture and tradition; museum and historical monuments exist in the region.

Revisit by Tourists in Ladakh

Most of the tourists were interviewed were visiting Ladakh first time. 76.40% of tourists said that they have come to Ladakh first time; only 23.50% tourists said that they are revisiting the place. Only2.25% of tourists said that they had already visited the place once before. 10.11% of tourists said that they had visited Ladakh twice before. 4.49% of tourists said that this is his fourth visit, same percentage of people said that they had already visited Ladakh four times before.2.24% of tourists said that they had visited Ladakh more than four times.

Among all the 23.50% tourists who said that they have revisited the Ladakh before, in 21.05% responses tourists said that they have revisited the region for monasteries, in 18.42% responses tourists said that they have revisited for trekking. In 10.53% responses each responses tourists said that they have revisited Ladakh for historical monuments and museum respectively.

Revisit by Foreign Tourists in Ladakh

Most of the foreign tourists who were interviewed were visiting Ladakh first time. 73.97% of tourists said that they have come to Ladakh first time; only 26.03% tourists said that they are revisiting the place. Only 2.74% of tourists said that they had already visited the place once before. 10.96% of tourists said that they had visited Ladakh twice before. 5.48% of tourists said that this is his fourth visit, same percentage of people said that they had already visited Ladakh four times before. 1.37% of tourists said that they have visited Ladakh more than four times

Among all the 26.03% tourists who said that they have revisited the Ladakh before, In 20.55% responses they said that they have revisited because of the existing monasteries in the region, in 19.18% responses tourists said that they have revisited for trekking. 10.96% responses were each for museums and historical monuments respectively. In 6.85% responses tourists said that they have revisited Ladakh for existing handicraft materials in the region. 5.48% each responses were for fairs and festivals and picnic for scenic beauty and picnic respectively.

Likely Revisit by Tourists in Ladakh

In Ladakh region it was found that majority of tourists want to revisit the region. 95.70% of tourists said that they would like to revisit the region, only 4.30% of them said that they would not like to revisit the region again.

Foreign tourists

Among foreign tourists 94.74% of them said that they would like to revisit the state of J&K, only 5.26% of them said that they would not like to revisit the region.

Duration of stay of tourists

To understand the duration of stay of tourists of different age group, sex, nationality, tourists were asked to tell about their total number of days spent or planning to stay in the region.

Duration of stay of foreign tourists

Foreign tourists stay here for longer period than any other location in the region, half of the interviewed tourists said that they stayed or planning to stay here for more than 30 days. 17.95% of

tourists said that their duration of stay was of 13 to 17 days.11.54% of tourists said that their duration of stay was of 3 to 7 days.6.41% each tourists said that they stayed or planning to stay here for 18 to 22 days and below three days respectively in the region.5.13% tourists said that their duration of stay was of 8 to 12 days.2.56% of tourists said they stayed or planning to stay here for 23 to 29 days

Duration of stay of Indian tourists

76.47% of interviewed tourists said that their duration of stay was of 3 to 7 days, 5.88% said that their duration of stay was of 30 days and above.5.88% each said that their duration of stay was of 8 to 12 days ,13 to 17 days and 18 to 22 days respectively.

Persons accompanying tourist

To know about the number of persons accompanying the tourist in their visit to J&K, tourists were asked to tell about the number of persons accompanying them in their visit to J&K.

64.21% of tourists were visiting the Ladakh along with one person, 18.95% of tourists were visiting Ladakh alone.14.41% of tourists were accompanied by two persons, 8.42% of tourists were accompanied by two persons, 5.26% of tourists were accompanied by four persons, rest 2.11% tourists were accompanied by more than four persons.

Foreign tourists

65.38% of tourists were visiting the Ladakh along with one person, 21.79% of tourists were visiting Ladakh alone.18.95% of tourists were accompanied by two persons, 8.97% of tourists were accompanied by two persons, 5.26% of tourists were accompanied by four persons, rest 2.11% tourists were accompanied by more than four persons.

Spending pattern of tourists

Foreign Tourists

This was observed that most of the tourists prefer to spend minimum in the state of J&K or in other word it can be said that most of those tourists visit J&K whose spending potential is less. In Ladakh region 39.74% of interviewed tourists said that they spend between Rs500 and Rs1000 daily in their tour of Ladakh, 26.92% of tourists said that they spend up to Rs500 daily in this tour of Ladakh, 14.10% said that they spend in between Rs1000 and Rs1500 daily.10.26% tourists said that they spend in between Rs1500 and Rs2000. 6.41% tourists said they spend in between Rs2000 and Rs2500

daily. 2.33% of tourists said that they spend in between Rs4500 and Rs 5000 daily and 1.28% of tourists said that they spend in between Rs2500 and Rs3000 daily in the tour of Ladakh.

Indian tourists

29.41% of tourists said that they spend in between Rs1500 and Rs. 2000. 23.53% of tourists said that they spend in between Rs 500 and Rs 1000 daily in Ladakh. 17. 65% tourists said that they spend in between Rs1000 and Rs 1500 daily. 11.76% each said that they spend up to Rs 500 & in between Rs. 2000 and Rs. 2500 daily in the tour of Ladakh

Locations visited by the tourists

Almost all tourists who visited Ladakh region visited Leh. Other places/ location which tourists visited were Seh palace, Hemis Gompa, Alchi Gompa, Stok Gompa, Choglansar, Lamayuru, Nubra valley.

Things Liked by Tourists

Those people who visited the Ladakh region said that they liked the scenic beauty of the place they liked the mountains, Landscape, mountain, snow mountain. Tourists said that they liked the climate of the place of the Ladakh region. Tourists said that they liked the monasteries and Gompas of the region, tourists said that they liked the people and the culture of the Ladakh region.

Things Disliked by Tourists

Tourists in the Ladakh region disliked the filth and garbage in the area, they also disliked the pollution generated by the vehicle. Tourists said that they disliked the traffic system of the Leh, tourists complained about the lack of toilet facility for tourists in the region. They said that they disliked the high Internet charges. Few tourists said that they disliked the lack of good hotel facility.

Suggestions given by the tourists

Since in Ladakh, majority of the respondents were from abroad, so their suggestions were mostly according to their need. Majority of them said that Internet facility should be improved. Tourists suggested that there should be proper mechanism to provide the information about the region and there should be detailed map of the region. They said that garbage-dumping system should be improved. One

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of their suggestions was of that to increase the quality and quantity of toilets. Electricity was one of their concerns and they said that the electricity availability should be improved and the lighting system of the street should be improved. Tourists also suggested to improve the bus stand. Some tourists suggested that good hotels should be built in the region.

TRAVEL AGENT SURVEY

In J & K around 26 travel agents could be contacted/ interviewed. In Srinagar 11 and in Jammu 15 travel agents could be contacted. The survey focused on various aspects of tourism industry in J&K.

TRAVEL AGENT SURVEY FINDINGS

KASHMIR

In Kashmir region total 11 travel agents/tour operators were interviewed.

Travel Agents Age Profile

All 11 travel agents were Srinagar based but they operate business in the whole of valley and Ladakh region. It has been found that business is mostly controlled by second or third generation people as 63 % interviewed travel agents were above 45 years of age and only 27% were below 35 and 9% were in the age group of 25 to 35.

Type of services provided by travel agents

Regarding type of services provided by tourist it was found 73% of interviewed travel agents provide Domestic Air and Rail ticketing service. Only 36% of them provide the International air ticketing facility and same percentage of them could handle travel related documents. Only 27% of travel agents could look after foreign exchange operation and mere 9% accepts traveler cheques. All travel agents could do booking in houseboats or hotels for there clients. 91% of them could arrange sight seeing trip for there customers, same percentage of travel agents can arrange taxi /car on rentals for tourist, again 91% of them said that they arrange conferences and seminars. 18% of them said that they give passport related service same percentage of travel agents said that they provide visa facilitation

Almost half of travel agents have branches of their business in other parts of country. Travel agents who have branches are mostly in Delhi and adjoining areas. None has any branch of their business out of the country.

Leading states from where tourist approaches maximum

Travel agents were asked to name four leading states from where tourist approaches them maximum. The ranking of the state is calculated on the basis of weighted term of responses of travel agents.

According to them Maharashtra is the leading state from where tourist approaches them maximum, Gujarat is ranked second leading state from where tourist approaches them maximum, Delhi is ranked third, West Bengal is ranked fourth, Karnataka is ranked fifth, Andhrapradesh sixth UP seventh and Tamilnadu is ranked eighth.

In weighted terms as per travel agents 38% of them ranked Maharashtra as the leading states from where tourist approaches them maximum. Similarly in weighted term 27% of people ranked Gujarat as the second leading state from where tourist come ,16% of people ranked Delhi as third leading state from where tourist approaches them maximum.9% in weighted term ranked West Bengal 4th leading state from where tourist arrive similarly 8% in weighted term ranked Karnataka as 5th leading state, 35% ranked Andhrapradesh and U.P. as 6th leading state from where tourist approaches. Tamilnadu is ranked 7th in weighted terms 1.16% in weighted term said so.

Tourist preferences for the different regions of Jammu & Kashmir

Travel agents were asked to give regional preferences of tourist between Jammu, Leh, Kashmir. Travel agents of Kashmir ranked Kashmir as leading region where tourist prefer to visit 39.18% in weighted terms ranked Kashmir as leading region Ladakh has been ranked 2nd and 29.72% in weighted term ranked Ladakh as second popular state. Jammu got 18.91% in weighted terms and is ranked third Kargil region is ranked fourth with 12.16% in weighted terms.

Problems faced by tourist in J&K

Regarding problem faced by tourists, it is found that various kind of problems do exist. 15% of them said main problem for tourist is excess security checking by security personals similarly 5% said unfavorable security climate as main reason. 15% of them complained against the electricity shortage and they identified it as a problem for tourist. 10% said lack of tourist car/coaches is a problem for tourists. 10% said lack of receiving facility at Srinagar Airport is a problem. Similarly 10% complained against inadequate communication facility as one of the problem for tourist 5% each identified lack of professional tourist guides and poor air services to be problem for tourists.

Tourist guide services

On providing tourist guide service it is found that 64% of them provide tourist guide but 18% do not provide any tourist guide facility, 18% of them did not respond.

About professional qualification of tourist guide, 36% of them said that tourist guides are professionally qualified but 28% said that they are professionally not qualified, 36% of them did not respond.

Tourist guide with the Knowledge of foreign languages

Regarding demand for the tourist guide with the knowledge of foreign language. Guides with the knowledge of English stood first and 64% of travel agent “said tourist demands tourist guide with the knowledge of English. For the demand of tourist guide with the knowledge of French 55% of travel agents said yes. 45% of travel agents said yes, for German, Japanese Italian and Chinese, 36% said yes for Arabic, 18% said yes for Taiwanese and Hebrew 9% said yes, for Spanish and Russian.

Per Day Spending potential of tourists coming to J&K

Only 36% of total respondents responded for question related to per day spending potential of tourist from different states/ regions. Out of 36% of respondents 50% said that south Indian spends in between Rs. 501 and Rs. 1500. Whereas 25% of respondents said south Indians spend in between Rs. 1501 and Rs. 2500, 25% said south Indians spend in between Rs. 2501 and Rs. 3500. 25% equally said west Indians spend in between Rs. 501 and Rs. 1500, Rs. 1501 and Rs. 2500, Rs. 2501 and Rs. 3500 and 25% said Rs. 3500 & above. 25% said north Indians spend in between Rs. 501 and Rs. 1500 and 25% said Rs. 1501 and Rs. 2500. 50 % said East Indians spend in between Rs. 501 and Rs. 1500, 25% said East Indians spend in between Rs. 2501 and Rs. 3500. 25% Foreigners spend in between Rs. 1501 and Rs. 2500, 75% of respondents said foreigners spends in between Rs. 2501 and Rs. 3500.

Preferential demands for Evening and night entertainment

Regarding preferential demands for evening and night entertainment in the Kashmir region 19% respondents said cultural programme at different spots should be organized. 19% said casino should be opened, 12.5% said Pubs and Bars should be opened. According to 12.5% Discotheque can be opened. Similarly 12.5% said Cinema theatres are required 6.25 each said folk music in dunga and light and sound show should be restarted.

Infrastructure in different regions of J&K

73% of respondents responded to the satisfaction level of respondents about existing infrastructure in the state. Out of these, 37.5% said they are satisfied with the existing hotels in Jammu region and other 37.5% said that they are not satisfied with the existing hotels of Jammu region. 25% respondent didn't prefer to respond for this question. 50% of them are not satisfied with the tourist guides of Jammu region where as 25% of them are satisfied with the tourist guide of Jammu region rest 25% didn't respond to the question. Regarding restaurants of Jammu region 62.5% said that they are satisfied with restaurants of Jammu region 12.5% are not satisfied with the restaurants, 25% didn't respond to the question .50% of the respondents are satisfied with the Road of Jammu region, 37.5% are not satisfied with the Road of Jammu region 12.5% didn't respond to this question.50% of them said they are satisfied with the taxis of Jammu region other 50% said they are not. Regarding Bus service in Jammu 75% said they are satisfied other 25% said they are not satisfied. For Air services in Jammu 62.5% said they are satisfied but 12.5% said that they are not satisfied, rest 25% didn't respond to this question. Regarding Telephone services in Jammu region 75% said that they are satisfied but other 25% said that they are not satisfied.

TRAVEL AGENT SURVEY FINDINGS

Jammu

Travel Agents Age Profile

In Jammu region total 15 travel agents/tour operators were interviewed.

All 15 travel agents were Jammu based but they operate business in the whole of Jammu & Kashmir. It is found that business is mostly in hand of young generation. 47%-interviewed travel agents were in the age group of 36 to 45, 40% were in the age group of 25 to 35 and rest 13% were below 25.

Type of services provided by travel agents

Regarding type of services provided by travel agents it was found 87% of interviewed travel agents provide Domestic Air and Rail ticketing service. Only 40% of them provide the International air ticketing facility and 33% percentage of them could handle travel related documents. Only 13% of travel agents look after foreign exchange operation for there client and 27% accepts travel Cheques . Majority of travel agents(80%) book houseboats or hotels for their clients. 93% of them could arrange sight seeing trip for there customers, same percentage of travel agents can arrange taxi /car on rentals for tourist. None of them said that they arrange conferences and seminars, give passport related service, and provide visa facilitation

None of travel agents have branches of their business in other parts of country

Leading states from where tourist approaches maximum

On the basis of weighted term of responses of travel agents, Delhi is the leading state from where tourist approaches them maximum, Maharashtra is ranked second, Gujarat is ranked third, Punjab is ranked fourth, west Bengal & Rajasthan are ranked fifth, UP sixth Andhra Pradesh & Madhya Pradesh ranked seventh and Karnataka and Bihar are ranked eighth.

Tourist preferences for the different regions of Jammu & Kashmir

Travel agents were asked to give regional preferences of tourist in Jammu, Ladakh & Kashmir. Travel agents of Jammu ranked Jammu as leading region where tourist prefer to visit, more than 48% in

weighted term ranked Jammu as leading region, Ladakh has been ranked 2nd , 24% in weighted term ranked Ladakh as second popular region . Kashmir got 17% in weighted terms and is ranked third Kargil region is ranked fourth with 11% in weighted terms.

Problems faced by tourist in J&K

Regarding problem faced by tourist, Security threat to tourist identified by travel agents as main problem. Other problems which have been identified are following behavior of security personals, Cheating in shops, Berth reservation problem in train, Lack of information, High room fair in the hotels, Fooding problem, Traffic problem, Non availability of water at bus stand, Electricity shortage, Place to rest at wayside.

Tourist guide services

On providing tourist guide services this is found that more than 73% of them provide tourist guide but near about 27 % do not provide any tourist guide facility. Regarding professional qualification of tourist guides, more than 73% of them said that tourist guides are professionally qualified but near about 27 % said that they are professionally not qualified.

Tourist guide with the Knowledge of foreign languages

Regarding demand, by tourist for the tourist guides with the knowledge of foreign languages. All of the travel agents said that there is no demand for any tourist guide with knowledge of any foreign language.

Per Day Spending potential of tourists coming to J&K

Travel agents were asked about the spending potential of tourist coming form different regions. Regarding south Indians, nearly about 47% of respondents said that south Indian spends less than Rs 500, near about other 47% said that they spend in between Rs 501 and Rs. 1500, Whereas near about 6% of respondents said south Indian spend in between Rs 1501 and Rs. 2500. 36% respondents said west Indian spends in between Rs 501 and Rs. 1500, Rs 1501 and Rs. 2500 & 21% spend in between Rs 2501 and Rs. 3500 respectively, only 7% said west Indian spend up to Rs 500. More than half of travel agents (53%) said north Indian spend in between Rs. 501 and Rs. 1500, and 40% said north

Indian spend up to 500 & in between Rs. 1501 and Rs. 2500 respectively. Only 7% said north Indian spend in between Rs. 2501 and Rs. 3500. Majority of respondents (74%) said East Indian spend only upto Rs 500, 13% said East Indians spend in between Rs. 501 and Rs 1500, 6.5% each said East Indians spend in between Rs. 1501 and Rs. 2500 & Rs. 2501 and Rs. 3500 respectively . More than one fourth of travel agents (40%) said foreigners spend in between Rs. 2501 and Rs. 3500, 20% each said foreigners spend up to Rs 500 & in between Rs. 1501 and Rs. 2500 respectively. 10% also said that foreigners spend Rs 3500 & above.

Preferential demands for Evening and night entertainment

Regarding preferential demands for evening and night entertainment in the Jammu region it was found that travel agents of Jammu region want all modern evening and night entertainment facilities for Jammu, 46.6% travel agent said there is a demand for nightclub in Jammu, 33.33% people said that garden with lighting facility should be built for tourists so that tourist can visit the park in the evening and night. 20% travel agents said that Discotheque should be open. Few travel agents said to build theater for cultural program. Travel agents suggested other demands to build facility on the pattern of Bombay based Essel world or Delhi based Appu ghar. Late night shopping facility in Jammu, 24 hour Zoo, pools, Boating in the evening were the other demands.

Regarding problem faced by tourist, majority (66.6%) of travel agents said that security threat to tourist is one of the main problems, 13.33% each said cheating in shops, Berth reservation in train and behavior of security personals respectively are problems. Other problems identified by travel agents were misguiding by touts, cheating in hotels, inferior road, lack of information about tourist places, high room fair in hotels, fooding problem, traffic problem, and electricity shortage.

Tourist preferences for different attractions age wise

Regarding preferences of tourists of different age group for different attractions in Jammu regions, it is found Jammu is famous for Mata Vaishnodevi shrine and tourism of Jammu mainly rely on the tourist coming to visit the shrines, same was observed in our survey. All of interviewed travel agents said that Pilgrimage and religious work is the most important attraction among all age group. 80% respondents said that Scenic beauty is second most popular attraction among tourists, 66.66% respondents said that third most important reason of tourist flow in Jammu is business and professional requirement. Although 13.33% respondents said that second important reason of tourist flow in Jammu is business

and professional requirement, similarly 13.33% respondents said that third important reason of tourist flow in Jammu is scenic beauty. Only 6.66% respondents said fair and festivals is fourth important factor of tourist arrivals in Jammu region

On similar line like all age group people Majority (86.66%) of travel agents said that people up to 15 years of age come for pilgrimage and religious work but 13.33% of travel agents said that people up to 15 years of age mainly come for scenic beauty. 6.66% travel agents said that second preferences of tourist up to 15 years of age is picnic at the same time 6.66% of travel agents said that third preferences of tourist up to 15 years of age is picnic.

There is no different opinion about tourist >15 years and up to 30 years, all of travel agents said first preferences of these tourist in Jammu region is pilgrimage and Religious work, 40% said second preferences of tourist of this age group is to visit places of scenic beauty, 20% travel agents said that second most important reason of tourist coming of this age group is Business or Professional requirement but 6.66% travel agents said that shopping is the second most important attraction for this age group.26.66% of travel agents said that scenic beauty is the third most important attraction for tourist of this age group in this region, 20% of travel agents said that Business or professional requirement is the third most important attraction for tourist of this age group.

Tourist of >30 years up to 45 years mainly come for pilgrimage and religious work in the Jammu region is the view of all of interviewed travel agents.46.66% of travel agents said that second preference of this age group tourists is to visit the places of scenic beauty ,where as 6.66% of travel agents said that scenic beauty is third preference .13.33% of travel agents said that second reason of visit of tourists in this region of this age group is there business and professional requirements, and 33.33% of travel agents said that third most important reason of tourist visiting this place is business and professional requirements.

Pilgrimage and religious work is the first preference of tourist of >45Years – 60 Years said by all the interviewed travel agents 33.33% said that Scenic beauty is the second most important attraction for people of this age group. Mere 6.66% travel agents said that business and professional requirement is the third reason of tourist of this age group coming to this place.

Like other age group tourist of >60 years mainly come for pilgrimage and religious work in the Jammu region is the view of all of interviewed travel agents.33.33% said that second attraction for this age group tourist is visiting places of scenic beauty.

Suggestions of travel agents for enhancing tourist flow in the state

This is observed that travel agents wanted to have more aggressive advertisement and publicity from government to promote tourism in J&K. Most of these suggestions were for advertisement or publicity about actual situation and tourist places of J&K. They wanted government to advertise about new locations and to do publicity about the improved security situation in the Jammu. According to them Government should try to change the image of J&K in the media.

Infrastructure in different regions of J&K

It was observed that travel agents of Jammu were satisfied with the most of existing infrastructure of Jammu region. All of interviewed travel agents said they are satisfied with the Hotels, Restaurants, Bus services, Air services, Telephone services, Banking services in Jammu. 93.33% each of interviewed travel agents were satisfied with the existing Road, Train services and Taxi services respectively. 46.66% of travel agents were satisfied with the tourist guides available in Jammu.

On the other hand Travel agents were very unsatisfied with some other services, only 20% interviewed travel agents were satisfied with the security services, only 13.33% travel agents were satisfied with the existing public toilets in Jammu, only 6.66% travel agents were satisfied with the parking facility in the city.

New locations in Jammu regions

Travel agents of Jammu identified many locations, which can be developed as tourist locations in future. Majority of travel agents (66.7%) said Mansar can be developed as new major tourist location. 40% of them said that Jhajar kotli can be developed as tourist location in future. 33.33% each said that Places like Sanasar and Mantalai, can be developed in future respectively. 26.66% each said that Patnitop and Bag e Bahu should be developed, 20% said that Sanasar should be developed. 13.33% said Rajori should be developed, 6.7% each suggested about places like Riasi, seven lakes, Mandwar, sarta, Noori sang Rajori water fall.

SURVEY FINDINGS OF HOTELIERS/ RESTAURANTS OWNER/ HOUSEBOATS IN J&K

Respondents Business profile

Total 124 respondents have been covered, out of them 45.96% were involved in the Hotel business and 13.70% were involved in the Restaurants business, 12.09% were Houseboat owners, rest were involved in other related business.

Services provided by Hoteliers

Regarding type of services provided by Hoteliers/ Restaurant owners/Houseboat owners it was found 62.90% of interviewed Hoteliers/ Restaurant owners/Houseboat owners provide Domestic Air and Rail ticketing services. Only 35.48% of them provide the International air ticketing facility and 29.83% percentage of them could handle travel related documents. Only 11.29% of Hoteliers/ Restaurant owners/Houseboat owners could look after foreign exchange operation and mere 13.70% would accept travel cheques. 36.20% could book houseboats or hotels for there clients. 77.4% of them could arrange sight seeing trip for there customers, 52.23% Hoteliers/ Restaurant owners/ Houseboat owners could arrange taxi /car on rentals for tourists, 24.19% of them said that they also arrange for conferences and seminars.

Spending potential of tourists coming to J&K

Hoteliers/ Restaurant owners/ Houseboat owners were asked about the spending potential of tourist coming form different regions. Regarding south Indians more than 34% of respondents said that south Indians spends up to Rs500, more than 56% said that they spend in between Rs 501 and Rs. 1500 and 4.35% said that they spend more than Rs 3500 and above. More than 48% respondent said west Indians spend in between Rs 501 and Rs. 1500 and 21.28% each said that west Indians spend Rs 1501 and Rs. 2500, only 4.26% said west Indians spend Rs 3500 and above. Majority of Hoteliers/ Restaurants owners/ Houseboat owners (62.50%) said north Indians spend in between Rs. 501 and Rs. 1500, and only 29.17% said north Indians spend up to Rs. 500. 46.67% respondents said East Indians spend up to Rs 500, 44.44% said East Indians spend in between Rs. 501 and Rs 1500. 34.78% Hoteliers/ Restaurants owners/ Houseboat owners said foreigners spend in between Rs. 501 to Rs. 1500, 28.26% said foreigners spend in between Rs1500 and Rs. 2500. 21.74% also said that foreigners spend Rs 3500 & above

Satisfaction with the support services

More than half of Hoteliers/ Restaurant owners/ Houseboat owners said that they are satisfied with the Hotels, Restaurants, and Public toilets, Security services in Jammu. More than two third of respondents said that they are satisfied with the Taxis, Bus services, Air services, Telephone services, Parking, train services. Only 45.10% respondents said that they are satisfied with the roads of Jammu.

All of the respondents said that they are satisfied with the Hotels of Srinagar. More than two third of respondents said that they are satisfied with the Tourist guides, Restaurants, Roads, Taxis, Security services in Jammu, Bus services, Air services, Telephone services. Less than half of the respondents said that they are satisfied with the Parking, and Public toilet in Srinagar Restaurants, and Public toilets, Security services in Jammu.

Most of the respondents were satisfied with the Hotels, Tourist guides , Restaurants, Roads, Taxis, Security services in Jammu, Bus services, Air services, Telephone service of the Ladakh region.

SURVEY FINDINGS LOCAL COMMUNITY OF J&K

Preferences of tourists

Total 75 local community members of J&K have been interviewed and we selected respondents from all three regions. In Kashmir region most of the local people said that tourists come here to see the scenic beauty of the Kashmir regions, People said that tourists also come here for religious work and pilgrimage purpose. Few local people said that tourists also come here for trekking and for their business and professional requirements. Almost all of people of Jammu region said that tourists come here for Pilgrimage and religious work; People said that although they mainly come for Pilgrimage and religious work but they also visit places like Patnitop for the scenic beauty of the place.

Majority of the respondents of Ladakh region said that the tourists mainly come here to see the monasteries and for trekking. Some Local people also said that tourists come here for Handicrafts and fairs and festivals of the Ladakh.

Infrastructure

Majority of the local people of Kashmir said that quality of Air services, Airport services, Hotels, Shikaras, Houseboat, Restaurants, Market shopping, Local telephone facility are good. Near about half of the respondents said that Bus services of Kashmir region is of average quality. Parking facility is said poor by more than half of respondents of Kashmir region. Near about half of the respondents said that Way side amenities of Kashmir region is of average quality, 21.74% of the respondents said that wayside amenities of Kashmir region is of poor quality, More than half of respondents said that the availability of wayside amenities is poor in the region. More than half of respondents said that availability of the tourists guide in the Kashmir region is average and near about one fourth of respondents said that the availability of tourist guide is poor.

More than half of respondents said that Bus service, Hotels, Market and shopping, Roads, Local telephone facility's/ ISD facility, Post office facility are of good quality in Jammu region. One fourth of the respondents said that the parking facility of the Jammu region is of average quality and rest one fourth said that parking facility of Jammu region is of poor quality. According to the respondents of Jammu region almost all the necessary infrastructure exist in the region.

46.15% of interviewed local communities of Ladakh region said that the Airport services is of average quality and 19.23% of them said that it is of poor quality. More than half of respondents said that the Market and shopping, tourist guides, STD/ISD facility are of average quality.

Comfortable Stay of tourists

Majority of respondents (96%) in Kashmir said that tourists have comfortable stay in the Kashmir region; only 4% said that tourists don't have comfortable stay in the region.

Jammu region was no different than Kashmir region and majority of local people think that tourists have comfortable stay in the Jammu region.

In Ladakh region around one fourth of the respondents said that tourists do not have comfortable stay in the region, rest 76% said that tourists have comfortable stay in the region.

SURVEY FINDINGS EXPERTS VISITS

Expectation of Tourists

Surveys both on domestic and foreign tourists visiting the States indicate that the visiting tourists have rather simple demands for our consideration.

The tourist today wants an efficient communication network. He desires the roads to be well maintained and clean. He wants a dedicated electricity supply in his room; he wants his food on time where he is staying; he wants a quick efficient internet facility to get him connected to his home or business base, and he gets his messages in India without a hitch.

He wants a public transport, which is not over crowded; he wants the taxi service in the State to be less expensive and the drivers more courteous. Some of the sampled foreign tourists were extremely unhappy with the behaviour of the taxi drivers and three wheeler drivers.

The tourist visiting the State of J&K is not asking for five star hotels. What he is asking is a place which is homely. The foreign tourists in particular have some set habits of their daily life. It is for the State tourist industry to recognise some of the basic needs of our visitor and cater to them. Our consideration is, that the State Directorate of Tourism should identify service providers, get the house holders registered in villages who would be owners of one, two or even three bed rooms and convert them into living 'modules'.

These bed rooms will be of minimum size 4.25 meters by 3.50 meters each module will have a set of crockery for the service of lunch/dinner. It shall have a study table, chair with separate light, two side tables beside the double bed, one telephone connection, one clothe iron, clean cotton line, small amount of toiletry, special toiletry for women, solar power emergency light (where there is no power, or power is disrupted); the room should be providing sun light and warmth. There should be adequate independent room heating facilities.

The State Department of Tourism should provide the first set of standardise crockery, rooms furniture and cooking utensils depending on the total offered bed capacity.

Civil Aviation

The State of J&K is presently served by three airports namely Srinagar, Jammu and Leh. The Jammu airstrip is the smallest but has high utility since aircrafts moving to Srinagar and Leh transit through this mini hub. There are also shuttle flights between Leh and Jammu.

Air Traffic in J&K

Jammu Airport is served by Indian Airlines, Jet Airways and Sahara Airlines Passenger traffic to Jammu causes no problems because there is enough passenger traffic to fill the plane destined for Vaishno Devi Shrine in the Trikuta Hills.

Passenger traffic to Srinagar, through Srinagar Airport, is directly linked with what is reported in the newspapers on law and order, and therefore, it is most unpredictable today.

Traffic to Leh for civilian passengers is limited to a five months period between May and September. In the remaining months a new statistical low plateau remains when only defense and para-military personnel are using the airlines facilities, to move in or out from Leh.

Very few tourist from South India

Surveys attempted to find out the originating station of visiting domestic tourist coming into the State, show that there is hardly any tourist traffic originating from the States of Andhra Pradesh, Karnataka and Kerala, destined to Srinagar, Jammu or Leh.

We had an opportunity to question the stray tourist visitors during the period of our study, who came from these areas, and their common refrain was the very high cost of travel.

The long distances discourage the domestic traveler of limited means, to travel by train across the whole of the country with his family members and then pursue his interest in mountain routes for more time.

Entertainment

Surveys conducted by the Consultants in Ladakh, Kashmir and Jammu regions reflected unanimity amongst the tourists that the State was wanted in entertainment plans after sun-set.

The climate of militancy has also contributed to a very large extent in the disappearance of commercial activities which provided to tourists to entertain themselves in Kashmir Valley.

Traditionally Ladakh region because of its severe cold climate was not developed to provide entertainment for tourists. Most of the festivals which are registered in the region fall in the summer or autumn season and festivities are located in the courtyards of well-known monasteries. To fill this void, the State Government started the Ladakh Festival which again falls in the summer season and

lately the Sindhu Darshan event has helped to extend the tourist season by another one week in Indus Valley.

In the entire Ladakh region there is only one cinema hall located at Leh for public access. The physical conditions inside this cinema hall can only be tolerated by the local youth for which there is no other avenue for entertainment. Cable Television in Leh town is not very popular yet because of scarcity of power supply. Some of the more enterprising hotel owners have installed their own cable network and provided power to run the television sets using captive generating plants.

There are two views regarding entertainment in Ladakh. In a majority of cases foreign tourists insist on their local hosts that they do not wish to have TV sets in their rooms because they are running away from all the noise of consumerism created in the West. The Indian tourists on the other hand insist on the largest selection of channels in the TV sets installed in their rooms. Sometimes there are differences coming out in the open between the foreign and domestic Indian tourists when the domestic tourists keep the volume of the TV sets high enough for the neighbouring room to get disturbed.

Yet the foreign and domestic tourists both feel the absence of traditional entertainment which they would like to be acquainted with. Ladakh region has no cultural centre or an auditorium to organize functions indoors. And indoor sports stadium has been inaugurated in the summer of 2002 and it still lacks the minimum furniture.

In Kashmir Valley, the best facility for organizing entertainment is available at the SK International Convention Centre on Dal Lake. Presently this is not accessible to tourists and is used only for hosting rare conferences organized at the State or national level.

The city cinema halls except one are all closed and two have been devastated by arson committed by local militants. The wrath of the militants still runs in the Valley against the cable operators with the result that cable and TV programmes are socially controlled and operators run the risk of being injured or killed for violating the militants' wrath. Outside Srinagar, the supply of electricity is erratic and within the city of Srinagar the voltage potential has only recently improved enough to help TV sets operate. Srinagar town does not have a national public auditorium. A social curfew is imposed in the whole Valley at set-set and shops closed so effectively leaving the town with a ghostly appearance. The tourist is locked in in his hotel room virtually. For the high value tourist, again, there is no entertainment and the State Government has not offered opportunities for artistes to perform regularly in towns or in hotels. Artistes from other States are fearful of entering the Valley.

In Jammu region again for the tourists there are insufficient diversions. The shops provide enough material for curiosity and visit. The local cinema halls run regular movies and a small theatre activity is also noticeable in Jammu city. Beyond Jammu city the region is devoid of any cultural activities or entertainment diversions.

Golf clubs for those who are inclined to outdoor activities exist in Punch, Jammu, Udhampur, Srinagar, Pahalgam, Gulmarg and Leh. The State Government has a policy to design more golf clubs to attract international tourists to the centres where the game of golf is offered. There is no selling activity within the State. There is a potential to generate this sports in many parts in the region. Water sports even otherwise are restricted to small stretches of rivers and the activity is not well publicized. For example, rafting and white water sports are organized on river Indus between Leh and Nemo. Some small sections of river Janskar have been used for rafting.

The State has been organizing recently the winter sports activities to extend the tourist season into the cooler months in Ladakh and Kashmir region but the emphasis is on Gulmarg. Additional work is under way to enlarge the existing successful schemes to expand winter sports including a suggestion to develop six new slopes for skiing in the Pirpanjal range. The Kondala cable ropeway at Gulmarg has been a successful venture and a new cable ropeway is under planning to connect Shankaracharya Temple from its base at Dal Lake. This may again be a daytime activity. Similar ropeway schemes exist in Vaishno Devi shrine. Additional schemes to install ropeways are identified in other parts of the State.

There have been repeated suggestions to introduce the Casino in the State. Traders in Jammu have put such a demand. The Consultants do not see the suggestion well for its location in a pilgrim visited centre but the suggestion need not be swept away outright.

As mentioned earlier the development of the infrastructure for tourism must be preceded by development of other support services such as consumer goods, agro based industry, handicrafts, civic amenities, enroute tourist facilities, health resorts, cultural centres, etc. The status of these services is discussed in the following paragraphs.

Consumer goods

An inspection of the shelves of general merchant shops in the State reveals the absence of locally manufactured products. The presence of products manufactured by multi-national companies is

pre-dominant followed by well-known Indian brands. In Jammu and Ladakh, foreign brands are noticeable while in Ladakh the shops are predominantly exposed to smuggled Chinese products. The general absence of Kashmiri products is a matter of disappointment. It is in the traditional sector of goods like saffron, dry fruit products, traditional handicrafts, woodcrafts, that one finds they are locally made.

It was not so all that bad in the early 1950s, the State of Kashmir in particular had some local industries which supplied products to the local market. Selective and partisan Nationalisation Industrial Policy was probably the main cause which led to the disappearance of these industrial undertakings while some of the entrepreneurs on their own left the State for better opportunities.

Presently the effort to develop the industries is to allow the development of industrial establishments mainly in Jammu region on the plea that they are nearer to the main markets of North India. Kathua district is being planned for the next 10 years to be converted into a major industrial area. This again may have its merit but it is again an activity which ignores the other parts of the State and their industrial potential. It is not helping in the absorption of wide-spread unemployed persons as the three distinct regions also suffer from population inertia as well as isolation.

A major factor that is now noticed by working to the disadvantage to industrialize the State of J&K is the present interpretation and enforcement of the 'State Citizen' laws which prohibited non-citizens of the State from having any access independently to undertake industrial activity or to generate economic growth. Civil servants who have spend their entire life in serving the State of J&K cannot settle down in the State in retirement if they are non-State citizens. Under the existing law even non-resident Kashmiris who moved out of the local area two centuries ago can have no foothold today in the State's future if they want to play any role and this is because of the manner in which the State citizen laws are interpreted or exist.

The result has been that in the organized industrial private sector there is no brand name existing which has a production base in the State of J&K. All the State Public Undertakings are failed ventures. All Government of India Undertakings are struggling to retain their presence and with rare exception all of them are running in huge losses. Within the limited knowledge of the Consultants, the only Government of India undertaking which is successfully operational is the Uri Hydel Project.

Agro & Related Industry

The State of J&K in the past survived on an agriculture base. In the past 50 years, serious efforts to develop agriculture were made which resulted in upgrading of agriculture activities but the effort to control the growth of population at the same time have eroded the benefits of increased agriculture activity.

Irrigation facilities are dependent upon the extent of snowfall or rainfall which comes in different seasons. Traditional floods in the Valley may be seen in the months of February and March, while in Jammu there would be in August and in Ladakh it is in September, if it floods.

The State has tried to develop an irrigation system based on a network of canals using the waters of Jhelum but the system is not very efficient. With water found in many places as a perennial source the Valley of Kashmir is now suffering rounds of dry season. The proposal to embank the Jhelum water in Wular Lake are obstructed by the Indus-Water Treaty. Even then because of lack of sufficient power generation it is not possible to presently contemplate any lift schemes in the Valley for providing water for irrigation. Because of heavy deforestation many of the perennial water springs have dried out or are now releasing insufficient water for irrigation purpose. The State has an Inland Waters and Lake Board which is supposed, amongst many things, to regenerate Dal Lake, save the Wular Lake from further shrinking, find the resources to improve the water flow in Jhelum river and identify also water potential in other regions.

In the agriculture sector, the development of fruit orchards has not shown consistent growth. The State has not done any significant work for diversifying the varieties or to upgrade the post harvest management techniques of apple and other related fruit industries. The result is that Apple and other related fruit products out of Kashmir are now finding strong competitions by imported fruit from Australia and New Zealand. The great irony is that wholesale market of Kashmiri apple is nowhere within the State of Kashmir but happens to be the Azadpur Mandi in Delhi. The fruit canning industries now exist apparently on paper only. Most of the fruit products originating from Kashmir are brought out of the State and canned in Punjab, Haryana and Chandigarh. The further development of the fruit canning industry has been severely constrained by bottlenecks due to irregular power supply, poor means of transportation to markets outside the state, etc.

Until 1847 the Kashmiris were not aware of utilizing the egg product in poultry rearing. Even now Animal husbandry exists while poultry farming is not receiving attention it deserves.

Food for the table except bread is generally imported into the State. This is one sector of support services which needs to be totally rejuvenated to make the State a surplus area for the export of consumable agriculture products.

State of Finance

The visitors to the State of J&K should know that figuratively speaking the people of the State are not poor.

There are visible signs of prosperity in most parts of the State. The construction of new houses has been an on going process inspite of very bad phases in law and order in the last 12 years. The worst hit public activity was of the tourist industry but otherwise life in the State has not been unbearable.

The Government of India provided funds for various governmental activity; more funds came from outside the State for various unofficial activities or through repatriation of money from those who were working abroad particularly in the Middle-East.

The economies in Jammu and Ladakh region were not severely hit and economic growth remained at an acceptable level. The economic activity however related to tourist industry in the Valley of Kashmir suffered immense damage and the industry practically came to a stand still.

Banking services in the Valley of Kashmir were severely affected. The nationalised banks stopped functioning as their staff was mostly consisting of persons from outside the State and they feared becoming targets of militants. They left their jobs as they moved out of the State borders. This led to a severe shortages in staff and the nationalise banks located in the Valley pulled down their shutters.

The foreign banks also suffered serious business activity for a variety of reasons and also for the fact that the work of financing industrial activity in the Valley was seriously disrupted. The foreign bank totally withdrew their business from the Valley.

Except for some branches of the State Bank of India the major banking institutions of the country have not reopened their branches in the Valley of Kashmir and there is no plan yet to revive banking services to the level as they were existing in the Valley in 1988.

One bank in particular has taken advantage of the circumstances, and this is the Bank of J&K. This bank is predominantly staffed by persons of local origin, and therefore, it did not suffer any migration of staff from any of its branches and continued to function. Left as the only source to provide small loans, the bank came up with schemes which monopolised the market. It began to offer these scheme as the only options left for the common man to work with, if he wanted financial loans for business activities.

Disbursement of Loans

In the course of time in the past six year because of the absence of the nationalised banks in large number working in the Valley, the State Government also parked its funds in the Bank of J&K. This led to an extraordinary growth in the banking activities of this small bank, which has now expanded into the more remote parts of the State as well as opened new branches in other parts of the country which have small pockets of Kashmiri residents living and working.

The growth of the Bank of J&K is unparalleled in the recent banking history in the country. We can not grudge this unique feature. We still have to comment on some activities of public services carried out by the local bank which are not helpful to those persons known to be in distress.

The system for loan seekers desires the applicant to file an application for seeking loans. The bank insists on property collateral before the loans are sanctioned. As soon as the money is about to be released to meet the financial requirements of identified business, the bank insists on 50 percent of the loan to be converted as fixed deposit in the same banking branch from where the loan was released.

In effect the person-seeking loan becomes a debtor of the bank having mortgaged his properties and he also does not get sufficient funds to meet his business requirements. On the other hand the bank is able to show in one column having released a substantial number of loans and in another column the bank shows new financial assets as fixed deposit opened by persons who have drawn the loan in the first instance.

We see this as a malpractice in the bank services being currently carried out which is not leading to desired economic assistance in the regenerate of small business in the Valley.

Another practice which is viewed as a harassment is noticed from of the operating branches of the nationalised banks. Any person applying for loans in the State of J&K with any nationalise bank must first apply and attach a statement in his application that he has not taken any loans from any other bank mortgaging the same property. All the branches of the banks existing in the Valley have to provide a 'No Objection Certificate'.

Attached is a sample case in the body of this main Report, to indicate the kind of work necessary for an applicant to undertake when he is seeking a small loan. In spite of completing the demanded formalities the loan may still not be given, as it is the total discretion of the local bank approached for the purpose to deny the loan. In case of the applicant of the loan whose photocopy document are attached the denial for the loan was made known to him. During our survey we were shown more than 2000 similar applications as proof that his instance was not an isolated case.

The tourists visiting the region is advised to carry travelers cheque. During the militancy period in the State of J&K, trunk dialing facility to telephone subscribers had been withdrawn. The result was that credit cards facility in the whole of the State came to a stop as most of the credit cards services facilities were interconnected with foreign banks in the Delhi or Mumbai. One enterprising businessmen however had devised a system of accepting credit cards from high valued tourists and taken down the essential requirements of credit facilities from his clients. The collected vouchers were then dispatched to New Delhi banks by a courier every fortnight to be converted into cash.

The enterprise created negative profit, to the establishment but the businessman insisted that the availability of credit facilities in his establishment to his clients would ensure the return of his clients to him in future and he valued his business more than temporary loss of profits.

The closure a large number of branches of nationalised banks created problems for domestic tourists in the Valley. Foreign exchange conversion facility also dropped significantly in Kashmir Valley as banking counters remained closed. This is not the case for Ladakh and Jammu region. A profile of the foreign exchange conversion counters available in Kashmir Valley shows that this service is very limited and there is great scope to enlarge the facility by granting licenses to shopkeepers who receive both foreign and domestic tourists.

Businesses in Kashmir Valley in the last decade have suffered substantially and an overwhelming number of small businesses catering to support services in the tourist industry have deep debts. The State Government has a sympathetic approach to the identified problem but there is no ready solution to overcome this crises. At the same time, lack of coordination has created problems for the businesses under crises, as local civic bodies have sent out demand notes for payments of arrears on house tax, municipal tax, sales tax etc. Income tax cases as old as two decades in the past have been opened. The effort is to collect revenue to show their own departmental performance when in fact there is hardly any business activity, which would generate income, which could be redistributed into other obligations.

The only solution lines in is getting more tourists to visit Kashmir Valley.

PROJECTED TOURISM POTENTIAL

One of the major aspects of the development of a perspective plan is the projection of the various activities with regard to the tourism. In this chapter we are presenting various important projections which could have a direct or indirect on the planning for tourism development.

The State of Jammu & Kashmir is one of the most important states in the country as far as the tourism is concerned. From the past data it is very clear that if the state was not affected with the insurgency and militancy, it would have been the major destination for attracting/ pulling the domestic as well as international tourists. Though there is a revival of tourism in the last 2-3 years it is not upto the level as in the late 1980's (1988 to be precise) when the tourism was at its peak.

Keeping in mind the above scenario, we are very optimistic that tourism would be reviving soon in the state. Our thought is further substantiated with the various steps being undertaken by the Government of India to bring normalcy in the state.

Table No. 8.1 shows the number of tourist arrivals in valley since 1975. The peak tourist arrival was in 1988.

TABLE NO. 8.1

YEAR WISE NUMBER OF TOURISTS WHO VISITED THE VALLEY FROM 1975				
SR.NO	YEAR	HOME	FOREIGN	TOTAL
1	1975	162676	22214	184790
2	1976	286412	38078	324490
3	1977	387817	54223	442040
4	1978	443342	59323	502665
5	1979	498067	55680	549747
6	1980	548491	46026	594514
7	1981	598555	43745	642300
8	1982	560987	42851	603838
9	1983	398428	41101	439529
10	1984	192684	36458	229142
11	1985	465599	38015	503614
12	1986	536598	53118	589716

Contd Table 8.1...

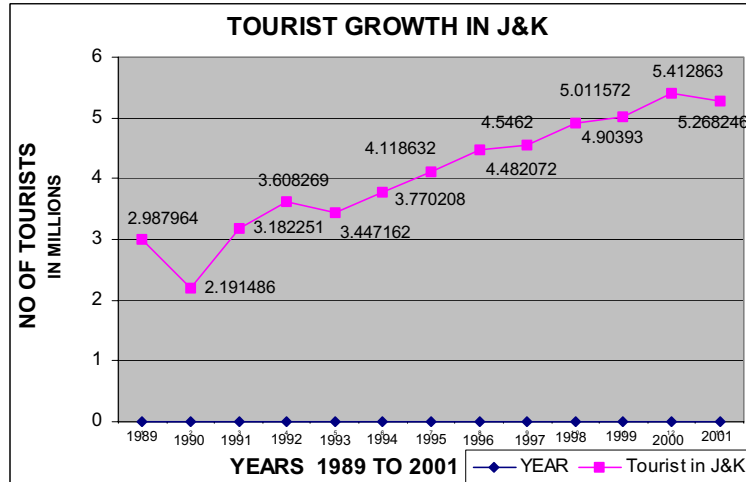
YEAR WISE NUMBER OF TOURISTS WHO VISITED THE VALLEY FROM 1975				
SR.NO	YEAR	HOME	FOREIGN	TOTAL
13	1987	664081	57537	721654
14	1988	662097	59938	722035
15	1989	490212	67762	557977
16	1990	6095	4627	10722
17	1991	1400	4887	6287
18	1992	1175	9149	10324
19	1993	-	8026	8026
20	1994	500	9314	9814
21	1995	322	8198	8520
22	1996	375	9592	9967
23	1997	7027	9111	16131
24	1998	99636	10247	109883
25	1999	200162	17130	217292
26	2000	104337	7575	111912
27	2001	66732	5859	72591
28	2002 upto 31st Jan	307	147	254

TABLE NO. 8.2

TOURISTS GROWTH IN JAMMU & KASHMIR

TOURISTS VISITING JAMMU & KASHMIR		TOURISTS VISITING JAMMU & KASHMIR (Region Wise)			
YEAR	Tourist in J&K	Amarnath	Ladakh	Vaishnodevi	Valley
1989	2987964				
1990	2191486				
1991	3182251				
1992	3608269				
1993	3447162				
1994	3770208				
1995	4118632				
1996	4482072				
1997	4546200				
1998	4903930				
1999	5013571				
2000	5412863				
2001	5268246				
1989		95238	22748	2312001	557977
1990		4824	6738	2169202	10722
1991		15599	9055	3151310	6287
1992		54638	16018	3527289	10324
1993		56000	14401	3368735	8026
1994		37000	17449	3705945	9814
1995		60000	17985	4032127	8520
1996		120000	16573	4335532	9967
1997		79035	16801	4434233	16131
1998		149920	22030	4622097	109883
1999		114366	11574	4668340	217292
2000		173334	18042	5109575	111912
2001		119037	19699	5056919	72591

FIGURE NO. 8.1



Almost a regular growth pattern can be seen in the tourists arrival in Jammu & Kashmir. But this regular growth pattern is mostly because of the tourists coming to Vaishnodevi. The tourists coming to Vaishnodevi are domestic tourists and the duration of their stay is limited from 2-3 days upto maximum of 5 days. There is limited diversion to other tourist places.

If we see the breakup of the tourists in the last decade, we find that almost 90% to 95% of the tourist arrivals in Jammu & Kashmir is because of Vaishnodevi shrine.

We are providing the projections for the tourists arrival in the Valley based on the assumption that the security position will improve in coming 2-3 years. We are also contemplating that the peak of tourist's arrival (722035 tourist arrivals) occurred in 1988 and from then onwards there is a gradual fall in tourist arrivals. So we are assuming that if this situation is made the base and shifted to 2000 from when the situation was becoming little normal and a reverse trend in tourist arrivals was seen we can make the projections of the tourists arrival in Valley. We are also taking two riders into our consideration for projection, that the growth rate of 1.055 which was attained from 1989-2000 being assumed for further projection and the 2nd rider being that the ceiling/ target on tourist arrival till 2020

be 20 lakhs, which the Valley can sustain. Further a reverse calculation by keeping the target/ ceiling on tourist arrival to be 20 lakhs (more arrivals might not be handled) by 2020 we get a the similar growth rate which justifies our assumptions.

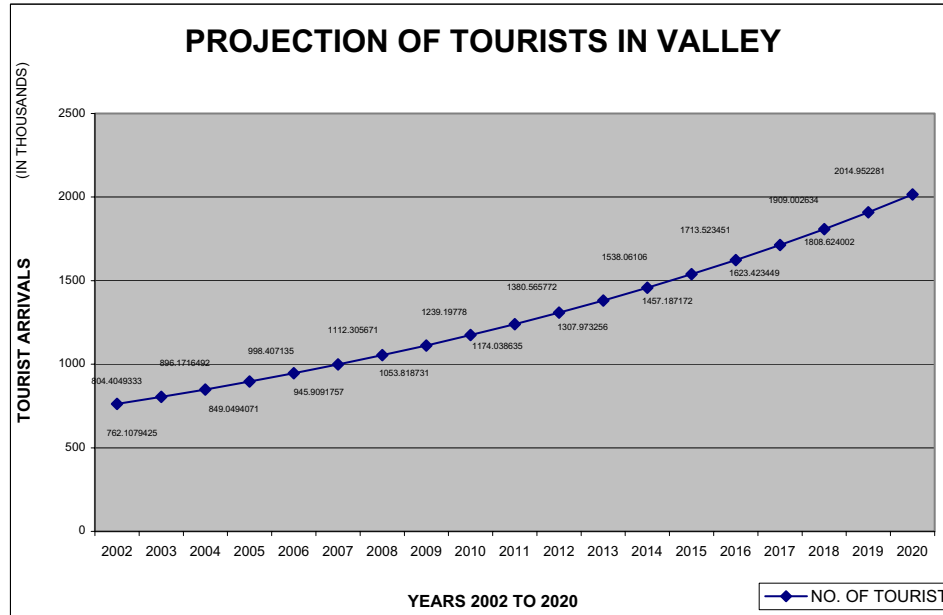
It is being projected that by the end of 2010 the tourists arrival in the valley would be around 11,74,039, considering the fact that normalcy will occur in the next 2-3 years which will rise to 20,14,952 by the end of 2020. Table No. 8.3 gives the year wise expected arrivals of tourists till 2020.

TABLE NO. 8.3

PROJECTIONS FOR TOURIST IN VALLEY	
YEARS	NO. OF TOURIST
2002	762108
2003	804405
2004	849049
2005	896172
2006	945909
2007	998407
2008	1053819
2009	1112306
2010	1174039
2011	1239198
2012	1307973
2013	1380566
2014	1457187
2015	1538061
2016	1623423
2017	1713523
2018	1808624
2019	1909003
2020	2014952

The figure No. 8.2 gives the projections of tourists likely to visit valley till 2020.

FIGURE NO. 8.2



Ladakh is one of the regions of Jammu & Kashmir which attracts maximum number of foreign tourists. Also in comparison to the domestic tourists the percentage of foreign tourists is very high.

TABLE NO. 8.4

TOURIST ARRIVALS FIGURES FOR LADAKH FROM 1974				
SR.NO	YEAR	FORIGNERS	HOME	TOTAL
1	1974	500	27	527
2	1975	650	128	778
3	1976	1798	253	2051
4	1977	7127	266	7392
5	1978	8748	873	9621
6	1979	9213	621	9834
7	1980	13104	1013	14117
8	1981	14000	-	14000
9	1982	12786	-	12786
10	1983	12833	-	12833
11	1984	11785	-	11785
12	1985	12245	6666	18911
13	1986	12828	3683	16511

Contd Table 8.4...

TOURIST ARRIVALS FIGURES FOR LADAKH FROM 1974				
SR.NO	YEAR	FORIGNERS	HOME	TOTAL
14	1987	13668	4114	17802
11	1988	16256	8608	24864
12	1989	16079	6669	22748
13	1990	6342	396	6738
14	1991	8014	1041	9055
15	1992	13580	2438	16018
16	1993	12401	2000	14401
17	1994	15369	2080	17449
18	1995	12391	5594	17985
19	1996	13036	3537	16573
20	1997	12810	3991	16801
21	1998	15238	6792	22030
22	1999	9669	1905	11574
23	2000	11825	6217	18042
24	2001	15439	4260	19699
25	2002 upto			
	31st Jan	57	10	67

We are providing the projections for the tourists arrival in Ladakh based on the assumption that the security position will improve in coming 2-3 years. We are also contemplating that the peak of tourist's arrival (24864 tourist arrivals) occurred in 1988 and from then onwards there is a gradual fall in tourist arrivals. So we are assuming that if this situation is made the base and shifted to 2000 from when the situation was becoming little normal and a reverse trend in tourist arrivals was seen we can make the projections of the tourists arrival in Ladakh. We are also taking two riders into our consideration for projection, that the growth rate of 1.171 which was attained from 1974-2000 being assumed for further projection and the 2nd rider being that the ceiling/ target on tourist arrival till 2020 be 5 lakhs, which Ladakh can sustain. . Further a reverse calculation by keeping the target/ ceiling on tourist arrival to be 5 lakhs (more arrivals might not be handled) by 2020 we get a the similar growth rate which justifies our assumptions.

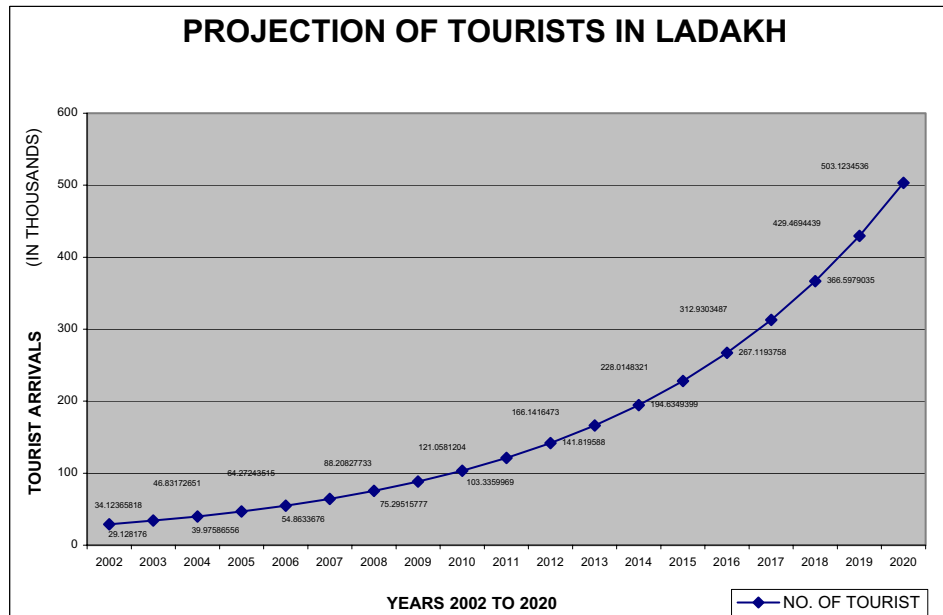
It is being projected that by the end of 2010 the tourists arrival in Ladakh would be around 1,03,336 which will rise to 5,03,123 by the end of 2020. Table No. 8.5 gives the year wise expected arrivals of tourists till 2020.

TABLE NO. 8.5

PROJECTIONS FOR TOURIST IN LADAKH	
YEARS	NO. OF TOURIST
2002	29128
2003	34124
2004	39976
2005	46832
2006	54863
2007	64272
2008	75295
2009	88208
2010	103336
2011	121058
2012	141820
2013	166142
2014	194635
2015	228015
2016	267119
2017	312930
2018	366598
2019	429469
2020	503123

The figure No. 8.3 gives the projections of tourists likely to visit Ladakh till 2020.

FIGURE NO. 8.3



We are providing the projections for the tourists arrival in Jammu based on the assumption that the security position will improve in coming 2-3 years. We are also contemplating that the peak of tourist's arrival (5109575 tourist arrivals) occurred in 2000. So we are assuming this to be the base to make the projections of the tourists arrival in Jammu. We are also taking two riders into our consideration for projection, that the growth rate of 1.075 which was attained from 1989-2000 being assumed for further projection and the 2nd rider being that the ceiling/ target on tourist arrival till 2020 be 2 crores, which Jammu can sustain. Further a reverse calculation by keeping the target/ ceiling on tourist arrival to be 2 crores (more arrivals might not be handled) by 2020 we get a the similar growth rate which justifies our assumptions.

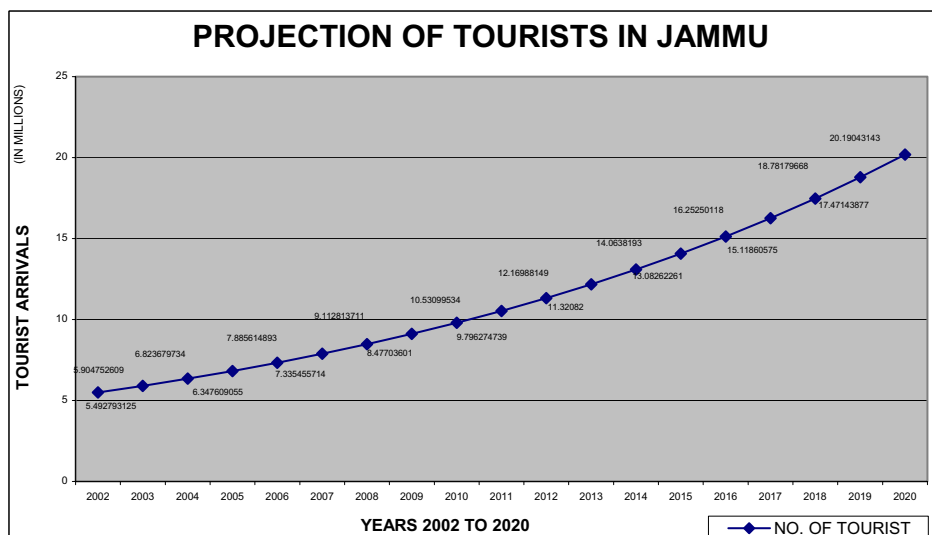
It is being projected that by the end of 2010 the tourists arrival in Jammu region would be around 97,96,275, considering the fact that normalcy will occur in the next 2-3 years which will rise to 2,01,90,431 by the end of 2020. Table No. 8.6 gives the year wise expected arrivals of tourists till 2020.

TABLE NO. 8.6

PROJECTIONS FOR TOURIST IN JAMMU	
YEARS	NO. OF TOURIST
2002	5492793
2003	5904753
2004	6347609
2005	6823680
2006	7335456
2007	7885615
2008	8477036
2009	9112814
2010	9796275
2011	10530995
2012	11320820
2013	12169881
2014	13082623
2015	14063819
2016	15118606
2017	16252501
2018	17471439
2019	18781797
2020	20190431

The figure No. 8.4 gives the projections of tourists likely to visit Jammu region till 2020.

FIGURE NO. 8.4



On consolidation of tourist arrival in individual regions, it is being projected that by the end of 2010 the tourists arrival in Jammu & Kashmir would be around 1,10,73,650, considering the fact that normalcy will occur in the next 2-3 years which will rise to 2,27,08,506 by the end of 2020

TABLE NO. 8.7

	PROJECTIONS FOR TOURIST IN JAMMU	PROJECTIONS FOR TOURIST IN LADAKH	PROJECTIONS FOR TOURIST IN VALLEY	PROJECTIONS FOR TOURIST IN J & K
YEARS	NO. OF TOURIST	NO. OF TOURIST	NO. OF TOURIST	NO. OF TOURIST
2002	5492793	29128	762108	6284029
2003	5904753	34124	804405	6743282
2004	6347609	39976	849049	7236634
2005	6823680	46832	896172	7766684
2006	7335456	54863	945909	8336228
2007	7885615	64272	998407	8948294
2008	8477036	75295	1053819	9606150
2009	9112814	88208	1112306	10313328
2010	9796275	103336	1174039	11073650
2011	10530995	121058	1239198	11891251
2012	11320820	141820	1307973	12770613

Contd Table 8.7...

	PROJECTIONS FOR TOURIST IN JAMMU	PROJECTIONS FOR TOURIST IN LADAKH	PROJECTIONS FOR TOURIST IN VALLEY	PROJECTIONS FOR TOURIST IN J & K
YEARS	NO. OF TOURIST	NO. OF TOURIST	NO. OF TOURIST	NO. OF TOURIST
2013	12169881	166142	1380566	13716589
2014	13082623	194635	1457187	14734445
2015	14063819	228015	1538061	15829895
2016	15118606	267119	1623423	17009148
2017	16252501	312930	1713523	18278954
2018	17471439	366598	1808624	19646661
2019	18781797	429469	1909003	21120269
2020	20190431	503123	2014952	22708506

FIGURE NO. 8.5

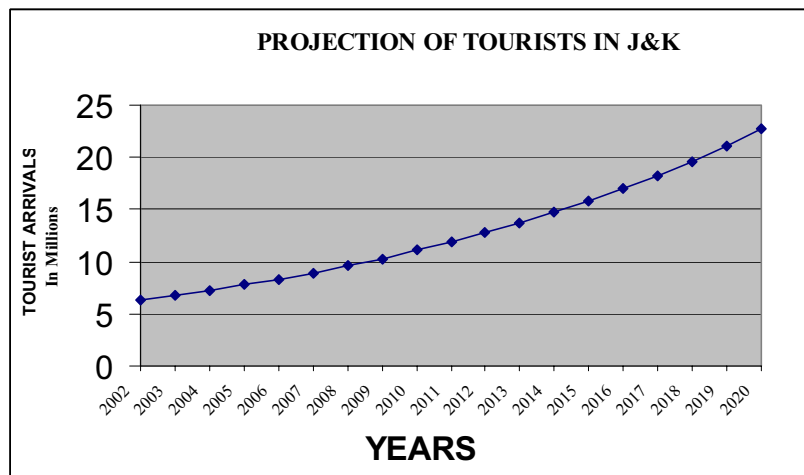


TABLE NO. 8.8

EXISTING INFRASTRUCTURE

Status of tourism infrastructure in Different Regions (Jammu, Srinagar and Ladakh)

Type of Infrastructure	Jammu		Kashmir		Ladakh	
		Bed Capacity		Bed capacity		Bed Capacity
Registered hotels						
5 star			4	1013		
3 star			5	786		
2 star			10	1060		
Class A	6	478	29	2110	36	841
Class B	23	1095	66	3239	25	352
Class C	102	3360	82	5585	14	155
Class D			21	751	7	72
Any other	12	1614	18	493	7	41
Registered Guest House/Lodges						
Upper class					14	218
Medium class					12	153
Economy class					80	870
All class	143	8527	112	2422		
House Boat						
Deluxe			324	1878		
A Class			137	645		
B Class			124	590		
C Class			127	574		
D Class			377	1680		
Travel Agents/Excursion Agents	213		192		118	
Guides	52		81		20	
Buses and Mini Buses	15583 in Jammu and Kashmir region				NA	
Taxis	6623 in Jammu and Kashmir region				NA	
Private cars /St wagons	43030 in Jammu and Kashmir region				NA	

TABLE NO. 8.9

**EXISTING INFRASTRUCTURE
IN JAMMU & KASHMIR**

Hotles	VALLEY		LADAKH		JAMMU		J&K	
	No.	Beds	No.	Beds	No.	Beds	No.	Beds
5 star	4	1013					4	1013
3 star	5	786					5	786
2 star	10	1060					10	1060
Class A	29	2110	36	841	6	478	71	3429
Class B	66	3239	25	352	23	1095	114	4686
Class C	82	5585	14	155	102	3360	198	9100
Class D	21	751	7	72			28	823
Any other	18	493	7	41	12	1614	37	2148
	216	12178	89	1461	137	6069	442	19708
Guest House/Lodges	112	2422	96	1502	143	8527	351	12451
Travel Agents/Excursion Agents	192		118		213		523	
Guides	81		20		52		153	
House Boats								
Deluxe	324	1878					324	1878
A Class	137	645					137	645
B Class	124	590					124	590
C Class	127	574					127	574
D Class	377	1680					377	1680

Projections of Infrastructure Requirements in the future

Now we are providing the requirements of the tourism infrastructure viz-a-viz the expected tourist arrival in the next 20 year and under this 20 year Perspective Plan. After taking due considerations on the bearing capacity of tourists, physical socio-economic character and environmental vulnerability these projections on the requirements are being made.

Further we have not recommended location specific needs of accommodation because of the absence of any schemes and data availability in the state regarding how the government plans to control environment degradation underway and how it plans to undertake developmental activities which have relation to tourism in the long run. The state is best in position to have data available on the means of sustaining economic growth in the local area. This could best be judged after having a long term interaction with the department of town and country planning. The consultant would be only too happy to be associated with any state government over a long run to provide such inputs to the state which otherwise should have been happily given by the department of town and country planning. For example the state forest act would come in the way of opening new urban pockets in a identified potential tourist site. The department of state electricity board would need to be in correspondence to affirm if the accommodation considered could be provided with the energy demands of the dwelling units. The consultants have given their projections on anticipated accommodations again based on the only reliable data available, which is pre 1989. Using this as a base and keeping in mind the factor of environment degradation and other related problems a general view has been taken. The department of town and country planning could use the suggestions of the consultants to provide further elaboration in future. For example the consultants are of the view that the Dal lake area is nearing the saturation level to withstand the future tourist traffic levels. The consultants have therefore recommended an alternate magnate to Srinagar / Dal Lake by suggesting developing the shore area around Wular lake and Sopore town. It may perhaps take more than a five years survey activity to come up with a master plan to open the Wular lake sector for sustainable activities in the tourism industry.

TABLE NO. 8.10

**PROJECTION OF INFRASTRUCTURE REQUIREMENT FOR FOLLOWING YEARS
IN JAMMU & KASHMIR**

ALL HOTELS

	2005		2010		2015		2020	
	Hotels	Bed	Hotels	Bed	Hotels	Bed	Hotels	Bed
Class Category								
Hotels	646	26760	997	38380	1674	57536	2965	89596
Starred Hotels	24	3573	31	4659	41	6117	53	8004
TOTAL	670	30333	1028	43039	1715	63653	3018	97600

STARRED CAREGORY HOTELS

	2005		2010		2015		2020	
	Hotels	Bed	Hotels	Bed	Hotels	Bed	Hotels	Bed
5 star	6	1266	7	1651	9	2167	11	2836
3 star	6	982	8	1281	11	1682	14	2200
2 star	12	1325	16	1727	21	2268	28	2968
TOTAL IN J&K	24	3573	31	4659	41	6117	53	8004

CLASS CATEGORY HOTELS

	2005		2010		2015		2020	
	Hotels	Bed	Hotels	Bed	Hotels	Bed	Hotels	Bed
Class A	112	4876	209	7854	408	13554	832	24821
Class B	160	6180	255	8748	433	13184	781	20529
Class C	285	11775	386	16198	584	22646	915	32080
Class D	38	1074	63	1524	114	2267	199	3559
Any other	51	2855	84	4056	135	5885	238	8607
J&K	646	26760	997	38380	1674	57536	2965	89596

GUEST HOUSES

	2005		2010		2015		2020	
	Hotels	Bed	Hotels	Bed	Hotels	Bed	Hotels	Bed
VALLEY	140	3027	182	3947	240	5183	313	6781
LADAKH	199	1985	439	37734	972	11391	2144	25116
JAMMU	191	11426	275	16371	395	23534	566	33766
J&K	530	16438	896	58052	1607	40108	3023	65663

TRAVEL AGENTS

	2005	2010	2015	2020
JAMMU	285	408	588	843
LADAKH	232	490	1083	2388
VALLEY	240	312	410	537
J&K	757	1210	2081	3768

GUIDES

	2005	2010	2015	2020
VALLEY	101	132	173	226
LADAKH	37	83	183	404
JAMMU	70	100	144	206
J&K	208	315	500	836

TRANSPORT

Type of transport	2005	2010	2015	2020
Infrastructure				
Buses	20179	27659	38178	60462
Taxis	8576	11755	16226	25697

TABLE NO. 8.11

**PROJECTION OF INFRASTRUCTURE FOR FOLLOWING YEARS
(REGION WISE)**

Projection of Requirement of the infrastructure is being done on the assumption that the maximum tourists arrivals/ peak of tourist arrivals occurred in 1988 and the full capacity utilization was there. So the growth rate of the infrastructure has been taken corresponding to growth rate of the arrival of the tourists.

KASHMIR

			2005		2010		2015		2020	
Registered Hotels	Existing Hotels	Bed Capacity	Hotels	Bed	Hotels	Bed	Hotels	Bed	Hotels	Bed
Guest House/Lodges	112	2422	140	3027	182	3947	240	5183	313	6781
House Boat										
Deluxe	324	1878	405	2347	528	3061	693	4018	907	5258
A Class	137	645	171	806	223	1051	293	1380	383	1806
B Class	124	590	155	737	202	961	265	1262	347	1652
C Class	127	574	158	717	207	935	271	1228	355	1607
D Class	377	1680	471	2100	614	2738	806	3595	1055	4704
Travel Agents/Excursion Agents	192		240		312		410		537	
Guides	81		101		132		173		226	

HOTELS

			2005		2010		2015		2020	
Registered Hotels	Existing Hotels	Bed Capacity	Hotels	Bed	Hotels	Bed	Hotels	Bed	Hotels	Bed
5 star	4	1013	6	1266	7	1651	9	2167	11	2836
3 star	5	786	6	982	8	1281	11	1682	14	2200
2 star	10	1060	12	1325	16	1727	21	2268	28	2968
Class A	29	2110	36	2637	47	3439	62	4515	81	5908
Class B	66	3239	82	4048	107	5182	141	6931	184	9069
Class C	82	5585	123	6981	133	9103	175	11951	229	15638
Class D	21	751	25	938	34	1224	50	1607	58	2102
Any other	18	493	22	616	29	788	38	1055	50	1380

LADAKH

Registered Hotels	No. of Hotels	Bed Capacity	2005		2010		2015		2020	
			Hotels	Beds	Hotels	Beds	Hotels	Beds	Hotels	Beds
Class A	36	841	68	1589	150	3498	330	7720	728	17021
Class B	25	352	47	665	104	1464	229	3231	506	7124
Class C	14	155	26	292	58	644	128	1422	283	3137
Class D	7	72	13	136	29	300	64	660	141	1457
Any other	7	41	13	77	32	170	64	376	141	836
Upper class guest house	14	218	26	52	58	906	128	2001	283	4412
Medium class guest house	12	153	22	289	49	636	110	1404	242	3096
Economy class guest house	80	870	151	1644	332	36192	734	7986	1619	17608
Travel Agents	118		232		490		1083		2388	
Guides	20		37		83		183		404	

JAMMU

Registered hotels	Existing Hotels	Bed Capacity	2005		2010		2015		2020	
			Hotels	Bed	Hotels	Bed	Hotels	Bed	Hotels	Bed
Class A	6	478	8	650	12	917	16	1319	23	1892
Class B	23	1095	31	1467	44	2102	63	3022	91	4336
Class C	102	3360	136	4502	195	6451	281	9273	403	13305
Any other	12	1614	16	2162	23	3098	33	4454	47	6391
Guest House/Lodges	143	8527	191	11426	275	16371	395	23534	566	33766
Travel Agents/ Excursion Agents	213		285		408		588		843	
Guides	52		70		100		144		206	

ENVIRONMENTAL ISSUES, IMPACT AND STRATEGY

In many developing countries, the costs of environmental degradation have been estimated at 4 to 8 percent of GDP annually. Natural resources degradation – depleted soils, insufficient water, rapidly disappearing forests, collapsed fisheries – threaten the quality of life of millions; an estimated 6 million people die annually, and many more get sick, in developing countries from water-related diseases, indoor air pollution, urban air pollution, and exposure to toxic chemicals. Environmental degradation also increases the vulnerability of people to natural disasters. The impact of environmental degradation threatens the basis for growth and livelihoods today and in the future. Environmental degradation also reaches across borders, affecting the quality of the regional and global commons. The Environment Strategy has to respond to these challenges.

Strategic Objectives could be:

- Improving the quality of Life
- Improving the quality of growth
- Improving the Regional and Global Commons

Regional Tourism and the Environmental Consideration

Himalayan region and particularly Jammu & Kashmir, is needed to be looked from the point of view of tourism. In the context of world tourism, the area is lacking in experience and expertise. The prestige and beauty of the region's socio-cultural and man-made environment may attract millions of tourists every year. The size of the industry requires the national management of the resources, which make up tourism. Whatever is left in some areas, it is reflecting a conflicting types of development, may soon be

transformed completely into a chain of unplanned constructions. One might find just a few unfriendly environment trees left around to remind the tourists that are supposed to be in an exotic place. This is a real danger that is exactly what will happen unless some alternative development strategies are brought to the fore. These are strategies, which must not only show more respect for the environment but facilitate some mutual understanding between the locals and the visitors.

Let us understand the magnitude of the tourism phenomenon in the Himalayan region. Do you realize that it represent a large slice of tourism development in India. The Himalayas is unique. It is a meeting point of many tourists from all over the world. It is the site of ancient civilizations and a beautiful area with outstanding natural assets. Given the constant growth of an ill-conceived tourist industry, it must be threatened with what amount to progressive destruction. There are some ideas about how such a situation can be avoided.

The contact between man and nature is more intimate on hills and mountain than the street of big cities such as Mumbai, Delhi, Kolkata and Chennai, etc. Therefore, the tolerable level of pollution is totally absent. Unfortunately, the various areas of region with tourist concentration are a dumping ground for municipal and industrial waste. These are getting a cheap public dustbin. Think of health hazards involved for tourists vacationing in the hill areas. Various diseases are often transmitted by contaminated food. It is obvious that the development of tourism in these areas makes pollution problems more acute.

Now, let us consider another problem of seasonality – the concentration of very high volumes of tourism in very congested period of time – summer season. The flow of tourists in Srinagar, Ladakh & Jammu during few months represents the highest percentage of the total number of tourist arrivals for the year. Also the average length is generally short. This time elements is an important variable. Hill resorts need to be equipped with adequate facilities such as water, sewage, transport, infrastructure, so

as to meet the peak periods in July and August. During the year the excess capacity of public services is a financial burden and a source of resentment for the local population also. When demand for public services reaches saturation point in the summer the local resident is no better off, and sometimes worse off, than the tourist.

Next, Himalayan tourism is given great economic importance by the various countries of the world. Most of these countries actively promote and pursue tourism development as a means to achieve a number of economic objectives. The most important of these objectives are generally deemed to be an inflow of foreign exchange, the creation of new jobs, an increase in government revenue and execution of certain regional development plans. Some of these objectives or a number of them are achieved. However, despite the apparent economic benefit derived from the tourist industry, there are some drawbacks. The foreign tourists in a developing region consumes mainly goods and services imported from abroad. Nor does tourism create as many job as expected. Most of the investments made in the field of tourism in developing countries do not always help to improve the welfare of the local populations. In many areas of this region the inhabitants did not have running water.

The Himalayan tourism is to be viewed in the broader context of new international economic orders. There should be greater parity in the distribution of the world's health and prosperity. If the present development trends are not corrected the bulk of the tourists will continue to go to the areas where the popularity of the region is open. Unspoiled space can still be found, is likely to increase in the future. Unfortunately, the spread of the tourist industry to these areas will have strikingly detrimental effects if it does not follow developmental guidelines, which are environmentally sound.

Well, one can not see how millions of tourists can be allowed to invade the area without damaging the natural and man-made environments. They are also bound to cause tension among the local population by introducing new life-styles and progressively promoting social, cultural and religious disruptions.

However, the ecological impact of tourism can have beneficial as well as detrimental results. Sometimes, to make a region attractive for tourism, measures are taken to drain unhealthy swamps and protect the fauna and flora of the area. Take the case of Languedoc -Reussillion where the drainage projects undertaken in the 1960s by the French Government have helped to eradicate malaria. Also green belts were created, 20 to 30 kilometers long, between each tourist resort. This contributed to the protection of environment.

On the other hand tourism, because of poor planning, often damages the vegetation and disturbs animal life. There is a wide spread criticism of pollution in the wake of tourism, such as automobile exhaust, detergents poured into rivers, and garbage of all kinds left at camping and picnic sites. Other kinds of environmental damages, which should be mentioned, are the destruction of vegetation by trampling, extinction of fragile species after the introduction of alien seeds, risk of forest fire, destruction in the cycles of animal life.

Tourism also seems to have had great repercussions on the man-made environment in both positive and negative ways. For example, the need to offer historical attractions to visitors had indirectly contributed to the restoration and protection of movements and picturesque villages. Revenue from tourism have provided local governments with badly needed funds to undertake such prefects.

Now, let us move to the negative aspect of tourism development. Large, unintegrated tourist resorts are being rapidly constructed with little consideration for regional planning. Also to cut costs and simplify construction one has a functional, box-like high rise type of building with no architectural or aesthetic merit. When every intensive high-density development is permitted with this type of building, the term 'concrete jungle' is something of an understatement. Some tourist resorts are by any standards, gross architectural insults to the natural or historical sites where they are located. Not only the buildings contrast sharply in style with the local architectural, but tourists have the exclusive use of these

structures. It seems that there are several motives for this type of tourist resort. Large number of visitors demonstrates a preference for an environment, which requires minimal cultural adjustment on their part also. Following deliberate governmental policies, some developing countries have tried to isolate visitors from the indigenous population, so as to minimize disruption to traditional life. A recent study pointed out that largely foreign-owned tourism resorts also tend to try to control related commercial activities so as to monopolize tourism activity. This way they seek to absorb the bulk of all in flowing foreign exchange from tourists. A foreign owned tourism sector is also often instrumental in organizing all inclusive package tours whereby the tourist pays for every thing in his country of origin and spends very little in the country he visits. Loose foreign exchange regulations in many countries allow for savage abuse.

Foreign architects have sometimes intended to soften the impact of some appalling urbanization projects. Tourism has introduced new social and cultural values of a disruptive nature in most regions, especially in developing areas. These seems to be three spheres which bear the brunt of the mass influx of foreigners art, religion, and human relations. Because of the need to exploit the 'entertaining' of visitors, traditional events are transformed into a highly commercialized form of mimicry. Some of the dances performed in the modern hotels and exhibitions of some local-traditional activities are examples of the vulgarization and commercialization of traditional forms of arts. Folklore should be appreciated in its appropriate context and not reproduced whenever tourists pay for it.

The religious character of certain historical movements is also grossly affected by tourism. Tourists can destroy the atmosphere of sanctity by clicking away with their cameras or, worse still, writing graffiti on columns and ancient frescos. Many tourists leave their signature on walls of temples, historical movements, etc.

Tourists can also introduce new life-styles and wasteful consumption patterns, which can have a very negative impact on traditional societies. The sudden invasion of tourist often seems to set up a series of shock waves, which can affect the value system, behavioral norms, and social conditions of the indigenous population.

The tourist industry also tends to alter established employment patterns, causing migration from rural areas to tourist centres. This affects agriculture and other traditional occupations. This might not be such a bad thing if only tourism could provide security and continuity of employment. It is not usual that it can, however, because of its seasonal nature in the hills and its sensitivity to overall economic fluctuations. Further more, specific tourist resorts may bloom for a short time and then turn into ghost towns after only a few seasons. Either they become no longer fashionable, or the big tour operators and mass media start-directing tourist flows to other destinations. The potential drawbacks of today's Himalayan tourism demand careful assessment in planning for the future.

Tourism to the Himalayan region is not going to decrease in the coming years. However, the constant growth may be hampered by economic recession. Without any hesitation it could be said that even in the case of major economic crisis, consumer demand for Himalayan holidays would remain high. Even if the world's economy may not be best, Himalayan tourism would continue to increase per year.

Chang Tang region is a repository of ancient culture and religious practices, and holds strong culture – nature bond. These wetlands are facing growing impact of tourism in the adds significantly to pressure on adjoining grasslands, leads to pollution, wildlife disturbance, change in local life styles and loss of cultural heritage. The degradation process is still in its initial stage and there are thus good prospects for conservation action if implemented urgently with the support of local communities.

Three of these wetlands, namely, Tsomoriri, Tsokar and Pangong Tso have been identified for priority action in the first phase. These wetlands are believed to be the most important breeding site for waterfowl in Ladakh and represent the only breeding ground of bar-headed geese (*Anser indicus*) in India and the only breeding ground for the globally threatened Black-necked crane (*Grus nigricollis*) outside China. In addition, this region also supports some of the most endangered species of mammals such as Kiang, Snow Leopard, Lynx, Himalayan Blue Sheep etc

In view of the extreme fragility of the lake ecosystems and their gross under representation at the national and International level, the thrust of the project is to develop a strategy and action plan (involving all stakeholders) for conservation of these lakes, with special emphasis on their recognition as sites of International importance under the relevant International Convention(s) as World Heritage / Ramsar sites.

STRATEGIES OF ENVIRONMENT PROTECTION

THE STRATEGY

Improving the Regional and Global Commons

Environmental initiatives could be build on these principles:

- ✓ Focus on the positive linkages between poverty reduction and environmental protection.
- ✓ Focus first on local environmental benefits, and build on overlaps with global benefits.
- ✓ Address the vulnerability and adaptation needs of regions/ developing countries.
- ✓ Facilitate transfer of funds to meet the costs of generating global environmental benefits.

Improving the quality of growth

Promote better policy, regulatory, and institutional framework for sustainable environmental management; help improve safeguard systems and practices; and promote environmentally and

socially sustainable private sector development. The private sector is becoming a major player in many areas previously controlled by the public sector. It should be ensured that the private sector becomes a driving force in sustainable development.

Improving the quality of Life

Enhancing Livelihoods. Protect the long-term productivity and resilience of natural resources and ecosystems on which people's livelihoods depend.

Reducing health risks. Focus on cost-effective measures to reduce environmental health risks, including reducing people's exposure to indoor and urban air pollution, waterborne diseases, and toxic chemicals. An example is the South Asia Urban Air Quality Management Initiative, which will develop cost-effective and realistic policies and efficient enforcement mechanisms to reverse the deteriorating trend in urban air quality in South Asian countries, and particularly to reduce ambient concentrations of fine particles – the most serious threat to public health in the region.

Reducing vulnerability to natural hazards. Aim to reduce vulnerability by helping to prevent and mitigate the impacts of natural disasters: supporting upland resource management and payments for environmental services; improving weather forecasting and the dissemination of weather-related information; managing land and mountain resources.

To avoid saturation of the Himalayan region or areas and to solve the environmental and social problems caused by today's tourism, we require alternative development strategies. For example, regional land use planning is an imperative. It should be achieved preferably within the framework of national land use directives or broad agreement at international level whenever necessary. The appropriate and responsible governmental bodies could make a selection of the areas where the national environment should be preserved and those that should be equipped for tourism. This should

be done in close collaboration with local authorities. An inter-ministerial commission is appointed to study the organization and natural potential of the stretch of the land concerned. Once the geographical site of each tourist, i.e. units had been chosen, ratio for each occupancy be decided upon – 600-people per hectare of the resort area. The maximum capacity of the resort should be fixed accordingly.

A greater number of national parks and forest reserves should be created. National parks and protected areas should be integrated components of environmental management policies and should serve educational and research purposes. In addition, they attract tourists and so will be the source of income as well. Tourism should expand in the whole region, especially in regions of low demographic density where sites with open space still exist. The tourist promotion of such areas would be accelerated by the creation of sport facilities and recreational and cultural centres.

Another strategy should be to stagger holidays by means of pricing policies and other incentives. This could lengthen the tourist season and reduce the flow of visitors during the months of July and August.

The existing anti-pollution norms should be tried and construction regulation should be enforced, and additional ones be proposed wherever needed.

Encouragement should be given for providing accommodation facilities other than hotels. Rooms for rent can provide a cheap alternative to the construction of big hotels and a good way of helping the tourist to develop friendship with the local population. The inhabitants of the region may be asked to improve the comfort of their houses in order to welcome the domestic tourists on holidays. Only basic infrastructures and recreational centre be built, which represent a minimal financial investment for the government.

Another very important element in any tourist industry development policy is the training and information. Training should be imaginative. The idea of training young men to welcome and help tourists to discover the region and its inhabitants could be emulated. The young social tourists should be promoted which would be respectful of the natural and human environment. People should be trained to help vacationers to enjoy their holiday in an intelligent way. Specific activities be suggested to the tourists such as historical visits, singing, crafts etc. The local festivals help the tourists to discover to know that there is more in their region than just beautiful hills, high-landers and pleasant people who have inherited from ancient, sophisticated civilizations the mastery of many modes of artistic expression. The ingenuity and extremely fertile imagination of the people of the region and similar activities could easily be initiated in the region.

A 'tourist code of conduct' for this region should be evolved, which could be applicable to both the tourist industry and consumers alike. All should strictly adhere to the provisions of code.

Let us now turn on to the positive side of tourism. It is labour intensive and creates many new jobs. It is a valuable source of foreign exchange earnings. The new physical infrastructure not only benefits the development of tourism but the local population as well. Tourism can create an audience and patronage for much needed development of local art, culture, and crafts.

For this region tourism is highly capital intensive. Tourism facilities and infrastructure require considerable injections of new capital and because of the aspects of land ownership and the obvious real estate contents of tourism development, direct foreign investment tends to be more resented than in a sector such as manufacturing. Other unfortunate side effect of tourism can involve the wild inflation of land prices as well as inflation of food prices. Tourism in these regions also tends to suffer from a high degree of seasonality and, with its various ups and downs, creates a feeling of uncertainty and anxiety among employers and employees.

TOURISM: IMPACT & ECONOMIC BENEFITS

INTRODUCTION

Travel & Tourism is the world's largest industry and creator of jobs across national and regional economies. WTTC/WEFA research show that in 2000, Travel & Tourism was to generate, directly and indirectly, 11.7% of GDP and nearly 200 million jobs in the world-wide economy. These figures are forecasted to total 11.7% and 255 million respectively in 2010.

The industry's direct services to customers represent between 3 and 4 percent of GDP in most of the world economy and employ about 3 per cent of the world's labour force. In some countries however, the hotel, catering and tourism industry employs as many as 10 per cent of the work force. Currently, the industry is growing worldwide about 3 per cent per year, but growth rates are very volatile and can change dramatically for a country from one year to the other. Including the industries serving tourists indirectly, i.e. providing infrastructure or other inputs to the direct tourism industry, the total tourism related economy has been estimated to produce as much as 11 per cent of GDP and to employ 8 per cent of the labour force worldwide (Data refer to 1999 and are from simulated tourism accounts by the World Travel and Tourism Council). Worldwide, one job in the direct tourism industry induces roughly one and a half additional (indirect) jobs in the tourism related economy. The ratio varies between 1.2 (North and Latin America) and around 2 (the Caribbean and Europe) and increases as per the developmental stage of country.

Creating jobs and wealth

Jobs generated by Travel & Tourism are spread across the economy - in retail, construction, manufacturing and telecommunications, as well as directly in Travel & Tourism companies. These jobs employ a large proportion of women, minorities and young people; are predominantly in small

and medium sized companies; and offer good training and transferability. Tourism can also be one of the most effective drivers for the development of regional economies. These patterns apply to both developed and emerging economies.

Contributing to Sustainable Development

The 1992 United Nations Conference on Environment and Development (UNCED), the Rio Earth Summit, identified Travel & Tourism as one of the key sectors of the economy which could make a positive contribution to achieving sustainable development. The Earth Summit led to the adoption of Agenda 21, a comprehensive program of action adopted by 182 governments to provide a global blueprint for achieving sustainable development. Travel & Tourism is the first industry sector to have launched an industry-specific action plan based on Agenda 21.

Travel & Tourism is able to contribute to development which is economically, ecologically and socially sustainable, because it:

- has less impact on natural resources and the environment than most other industries;
- is based on enjoyment and appreciation of local culture, built heritage, and natural environment, as such that the industry has a direct and powerful motivation to protect these assets;
- can play a positive part in increasing consumer commitment to sustainable development principles through its unparalleled consumer distribution channels; and
- provides an economic incentive to conserve natural environments and habitats which might otherwise be allocated to more environmentally damaging land uses, thereby, helping to maintain bio-diversity.

Providing Infrastructure

To a greater degree than most activities, Travel & Tourism depends on a wide range of infrastructure services - airports, air navigation, roads, railheads and ports, as well as basic infrastructure services required by hotels, restaurants, shops, and recreation facilities (e.g. telecommunications and utilities).

It is the combination of tourism and good infrastructure that underpins the economic, environmental and social benefits. It is important to balance any decision to develop an area for tourism against the need to preserve fragile or threatened environments and cultures. However, once a decision has been taken where an area is appropriate for new tourism development, or that an existing tourist site should be developed further, then good infrastructure will be essential to sustain the quality, economic viability and growth of Travel & Tourism. Good infrastructure will also be a key factor in the industry's ability to manage visitor flows in ways that do not affect the natural or built heritage, nor counteract against local interests.

Challenge for the Future

Travel & Tourism creates jobs and wealth and has tremendous potential to contribute to economically, environmentally and socially sustainable development in both developed countries and emerging nations. It has a comparative advantage in that its start up and running costs can be low compared to many other forms of industry development. It is also often one of the few realistic options for development in many areas. Therefore, there is a strong likelihood that the Travel & Tourism industry will continue to grow globally over the short to medium term.

Of course, if Travel & Tourism is managed badly, it can have a detrimental effect - it can damage fragile environments and destroy local cultures. The challenge is to manage the future growth of the industry so as to minimise its negative impacts on the environment and host communities whilst maximising the benefits it brings in terms of jobs, wealth and support for local culture and industry, and protection of the built and natural environment.

TOURISM: IMPACT

INTRODUCTION

In the contemporary period, tourism has become a big business and has been considered as one of the fastest growing industry. This is primary a service industry because it does not produce goods but extend services to various class of people. Tourism can serve as an effective instrument in integrating entire universe. With development of technology mobility of one place to another has become quite easier and this is considered as a positive sign for the development and growth of tourism Industry. With a span of time and its development it has created visible impact in the society, environment and economic life of human being.

The Tourism impacts could be direct and indirect related to : economic, demographic, and environmental-which might result from tourism development. For example if we develop a hotel in the tourist destination the possible impacts could be as depicted in the following Table No. 10.1

TABLE NO. 10.1

New Hotel Development for Tourism

DIRECT IMPACTS		POSSIBLE INDIRECT IMPACTS	
Employment		Employment	Income
construction		multiplier effect creating other jobs	multiplier effect
permanent		shift away from older hotels	
Income	Revenues	Land Use	
wage and salaries of new hotel employees	sales	development around new hotel, such as housing and businesses	
profits	property tax	increased property values	
	business permits, etc.	traffic congestion	
Land Use	Service Costs	Environmental/ Social Costs	
changes in land values	sewer	loss of time in traffic congestion near new hotel complex	
	water, etc.	increased air pollution damage and less "room" for additional industrial development because of air quality standards	
	schools		

Socio Cultural Impact

Tourism affects the locals in both negatively and affirmatively.

Tourism plays vital role in cross-cultural exchange of two cultures. It helps to learn about different languages, lifestyle and traditions. It provides opportunities to adopt the qualities of different culture vice-versa. as tourist are also bound to cause tension among the local population by introducing new lifestyles and progressively promoting social, cultural and religious disruptions

Tourism provides opportunities to local people to raise their living standard by increasing employment opportunities.

Tourism serve as a means of conserving the cultural heritage of the local area which otherwise might be lost due to development. It provides scope for conserving local dance, art, craft, music, drama and dress, as these plays a significant role to attract tourist.

Preventing Socio –Cultural Problems

Preservation of existing distinctive local architectural styles and encouraging new development.

Awareness programmes about tourism may be organised through mass media about the positive aspect of tourism.

Strict legal provisions for drug abuse, prostitution and other crime.

ENVIRONMENTAL IMPACT:

Mountain regions and communities often have fragile environments and socio-economic relations, the latter frequently important factors in environmental management. Problems associated with tourism in mountain regions include: sewage pollution of rivers, sedimentation and emissions from construction activities, erosion and landslides linked to trails and skiing/ snowmobiling, water extraction from streams to supply resorts, damage to habitats during construction and use, interruption by roads and construction of animal migration between life zones, litter accumulation on trails.

In many mountain areas, concern has grown about the negative impacts of tourism on the natural environment, village economies and cultural traditions. But these concerns can be addressed by practicing multiple land use methods of resource management combined with sustainable community development. If all activities are carried out with the full participation of local people and communities which make them guardians of their resources and are designed to ensure that local people benefit from trekking tourism and conservation then also these could be addressed.

The main potential adverse impacts of tourism on the environment include:

1. Pressure on natural resources

The main resources at threat are:

- *Land and landscape*: mining, land erosion, soil erosion, urbanisation, road and airport building leading to land degradation, loss of wildlife habitats, deterioration of scenery
- *Water resources*: recreational impacts, (scuba diving, snorkelling, sport fishing), damage to water/ lakes eco system and fisheries
- *Atmosphere*: high levels of energy use in tourism facilities and in transportation
- *Freshwater*: overuse of critical water resources for hotels, swimming pools and golf courses.
- This is of particular concern in lower regions where water resources are scarce and each tourist consumes more than 100 –150 litres a day.
- *Pressure on other local resources*: for example energy, food, and other raw materials which may be in short supply locally.

2. Harm to wildlife and habitats, with associated loss of biodiversity

The main harm to wildlife and habitats is:

- *Biological resources*: disruption of wildlife habitats, clearance of vegetation for tourism developments, increased pressure on endangered species due to trade and hunting; extra demand for fuelwood, forest fires

- *Ecologically fragile areas:* such as rain forests, wetlands, mountains, if not properly planned and managed nature tourism threatens the world's most ecologically fragile areas including parks and natural world heritage sites.

3. Pollution and wastes

Pollution and wastes contaminate:

- *Land:* solid wastes and litter (a tourist produces an average of about 1 kg of waste a day)
- *Freshwater:* pollution by sewage
- *Water:* sediment run off, pollution from land-based hotels; waste & litter linked with water sports
- *Air:* at local level, air pollution from tourist transportation, global impacts, especially from CO₂ emissions, related to energy use in transportation, air-conditioning and heating of tourist facilities, etc.
- *Noise:* related to ground as well as air transportation.

4. Social and cultural pressures related to conservation and sustainable use of biodiversity

- *Social and cultural impacts:* tourism means disturbance to the local way of life and disturbance of social structures, and can adversely affect traditional practices that contribute to the conservation and sustainable use of biodiversity
- *Adverse impacts on livelihoods* and lack of benefit sharing with those who bear tourism related costs to both the human and natural environment.
- *Resource use conflicts:* competition between tourism and local populations for limited resources of water, sanitation and energy, competition with traditional land uses, especially in heavily used areas.

Positive Environmental Impact

- a) Tourism is encouraged as a part of effort to regenerate the area and interiors. Tourism is generally encouraged in the periphery towns and city areas with less number of buildings and vacant land. The meaning of development of tourism in these areas is investing the money for environmental improvement. Tourism development can be seen as a vital aspect in physical and economical regeneration of remote and under developed areas as it contributes to attractive appearance of the environment like better water supply system, planned sewage and solid water disposal and overall improved environmental quality.
- b) Tourism helps in conservation the old historic monuments, protected and reserved forests assets etc that could be neglected otherwise.
- c) There is a close synergy between handicrafts and tourism. Handicrafts are great tourism boosters. Handicrafts and its process of manufacturing are great means of attractions for the visiting tourist. On the other hand tourism also helps in revival of dying arts and crafts, it provide a source of income to the craftsmen and artisans with lesser investment.

Negative Environmental Impact

Tourism is the world's largest industry. Although a "smokeless" industry, it has important environmental implications. It is a fact that all over the world man has been using the natural resources without even thinking the consequences of the misuse, which is creating environmental misbalance. Today environmental pollution poses a serious threat to life in earth not only in industrial areas but also areas where there is a great concentration of tourist.

Unfortunately, the various areas with tourist concentration are dumping ground for municipal and industrial waste. Think of the health hazards involved for tourists vacationing in the hill areas. In the tourist areas various diseases are often transmitted by contaminated food. Locals of the area mainly face the severity of problem as during the peak period the demand of public services reaches saturation point, there are generally shortage of water, unclean environment due to piled garbage and lots of pollution.

On the other hand tourism because of poor planning often damages the vegetation and disturbs animal life. There is a wide spread criticism of pollution in the wake of tourism, such as automobile exhaust, detergents poured in to rivers and garbage of all kinds left at camping and picnic sites. Other kinds of environmental damages, which should be mentioned, are the destruction of vegetation by trampling, extinction of fragile species after introduction of alien seeds, risk of forest fire, destruction in the cycles of animal life.

Development of tourism has an impact on wildlife, which is likely to be affected due to hunting, photography and filming by the tourist. The degraded environment (dirty water, piles of garbage etc) creates ecological disbalance, which affects the local wild life; the impact is largely visible on mammals and birds.

The problem of water pollution rises due to improper development of sewage and solid waste disposal system from hotels and other residential facilities. Sewage disposal is affected either through septic tanks and absorption pits. This water pollution affects the eco system of the area.

There are incidences of misuse of archaeological and historical monuments by the tourist

All these happen due to poor planning in this sector. For tourism the quality of the environment is the basis for attracting visitors and needs to be conserved. Tourism development can become a positive factor for improving environment if some amount of intelligent planning is done.

Recommendations

The size of tourism industry requires the national management of the resources. The existing unplanned development may soon be transformed completely in to a chain of constructions of unplanned infrastructure. It is necessary that some alternative development strategies be brought to the fore. These are strategies, which must not only show more respect for the environment but also facilitate some mutual understanding between locals and the visitors.

A separate and distinct planning efforts are required aiming primarily at determining the best location of facilities, hotels, resort facilities and transportation networks. The planning should view tourism as a source of foreign exchange earnings. There should be an approach of profit maximising by development to accommodate the maximum possible number of projected visitors and to design facilities to generate the maximum possible spending by the tourist.

The existing non-pollution norms should be tried and construction regulation should be enforced. A tourist 'code of conduct' for this region should be evolved which could be applicable to both tourist industry and consumers alike. Legal provisions are made/applied for strictly following of the 'code of conduct'. Specially for the areas of archaeological value and there should be strict legal action for

- Damage of monuments
- Destruction of environment of surrounding areas
- Construction of other buildings in the adjoining areas
- Dumping of waste in open
- Unauthorised industrial activities

A greater number of national parks and forest reserves should be created; national parks and forest reserves should be integrated components of environmental management policy. Tourism should expand in the whole region, especially in regions of low demographic density where sites with open space still exist. These areas can be promoted by creation of sport facilities and recreational and cultural centers.

Other Recommendations

For the tourism industry to remain credible in their commitment to sustainable development and be responsive to the environmental concerns, it needs to address the following issues:

Promote Wider Implementation of Environmental Management, particularly in the many small and medium enterprises that form the backbone of the tourism industry, and spread initiatives to all sectors of the tourism industry.

Use More Widely Environmentally-Sound Technologies, in particular to reduce emissions of CO₂ and other greenhouse gases and ozone depleting substances as set out in international agreements

Raise the Awareness of Tourism Clients of the environment and social implications of their holidays, and of opportunities for their responsible behaviour

Develop a Better Dialogue with the Local Communities in travel destinations and promote the involvement of local stakeholders in tourism ventures

Work with Governments and Other Stakeholders to improve the overall environmental quality of destinations

Report Publicly on environmental performances *and address the key issues of siting and more ecoefficient design* of tourism facilities

Developing Partnership: For sustainable tourism the involvement and commitment of all stakeholders are essential. However, public, private and academic sector partnerships are still underdeveloped and therefore need to be encouraged.

Involvement of the Banking and Insurance Sectors: banks and insurance companies could greatly expedite progress of sustainable tourism by incorporating environmental and social criteria into assessment procedures for loans, investments, and insurance. They could help finance environmentally-sound technologies and provide incentives for sustainable tourism. Widespread involvement of the banking & insurance sectors should be sought.

Use of Economic Instruments: the tourism industry consumes increasingly scarce natural resources. The costing of energy and water in particular could expedite greatly ecoefficiency in the tourism industry and raise revenue for the improved management of these resources. Governments should consider the development and widespread use of economic instruments for sustainable tourism.

Involvement of Tourism Board: Often, marketing strategies and messages are not in line with the principles of sustainable tourism. There is the need to better . involve tourism boards in sustainable tourism efforts.

Capacity Building of Local Government: Local government has important responsibilities regarding tourism development. Capacity building programmes should be implemented to help them understand these responsibilities, develop integrated and participatory approaches and define and implement policies for sustainable tourism.

Greater Focus on Transport: There is a continued development of long-haul travel. Economic, technological & management approaches should be developed to reduce emissions, waste & pollution resulting from tourism transportation. Changing consumption patterns should also be considered.

Emerging Types of Tourism: Tourism is rapidly diversifying. Emerging forms of tourism should also develop according to sustainability criteria

Improving Monitoring: Careful monitoring of impacts and results as well as the adoption of corrective measures are conditions for sustainable tourism. All stakeholders at all levels should thus develop monitoring. As previously stated, the private sector should develop monitoring and public reporting of their activities. Local and central governments should develop, more widely, monitoring tools such as indicators, and incorporate the results into their decision making process. Where appropriate, participatory approaches should be used. Monitoring is currently uncommon and this should be a priority.

FIGURE NO. 10.1
CONSIDERATIONS FOR SOCIO- ECONOMIC IMPACT OF TOURISM

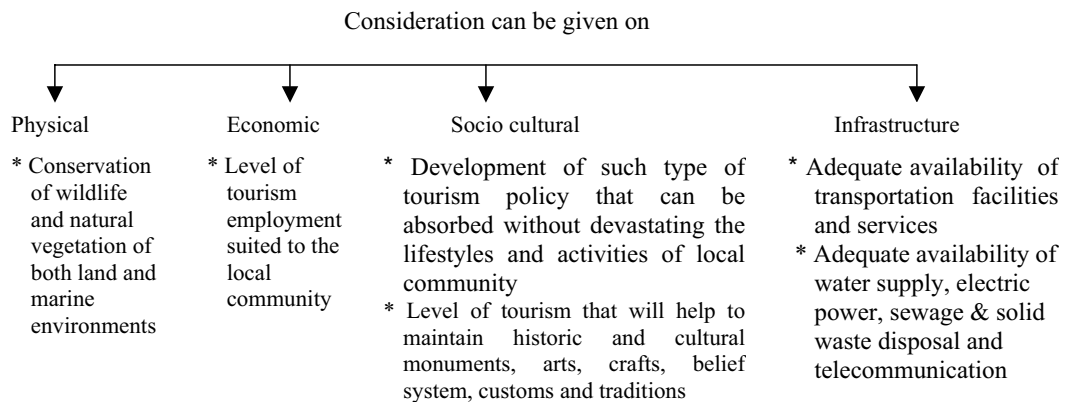


TABLE NO. 10.2

Potential Negative Impact and their Mitigation Measures

<i>Negative Impact</i>	<i>Mitigation measures</i>
<p><i>Socio Cultural</i></p> <p><i>Drug abuse</i></p> <p><i>Flourishing Prostitution</i></p> <p><i>Adoption of outside culture and lifestyle</i></p>	<p><i>- Legal measure to prosecute those indulged in these activities</i></p> <p><i>- Efforts & encouragement for conserving/promotion of local culture</i></p>
<p><i>Environmental Impact</i></p> <p><i>Deforestation and loss of rarely found wild animals</i></p> <p><i>Erosion due to uncontrolled clearing of forest for infrastructural construction like buildings and roads</i></p> <p><i>Water pollution due to unplanned sewage, lack of disposal system and infiltration of ground water</i></p> <p><i>Misuse of archaeological and historical monuments</i></p>	<p><i>- Strict legal measures for the preservation of rare wildlife and strict action against the culprit</i></p> <p><i>- Legal measures for protecting the forest coverage</i></p> <p><i>- Afforestation programme</i></p> <p><i>- Systematic planning for sewage system and efforts for recycling of disposed materials</i></p> <p><i>- Encouragement of local capacity for monitoring of safe disposal and legal action for culprit</i></p> <p><i>- Awareness for cleanliness by putting boards and distributing pamphlets</i></p> <p><i>- Legal provisions are made/applied for strictly following of the 'code of conduct'</i></p>

TOURISM: ECONOMIC BENEFITS

ECONOMIC BENEFITS

EMPLOYMENT GENERATION THROUGH TOURISM

Tourism has major economic significance for the people of Jammu and Kashmir. The visits from domestic and international tourist provide a valuable source of earning. Visitors spending generate income for both public and private sectors beside effecting wages and employment opportunities

According to Economic survey 1998 there were 6318 hotels and Restaurants enterprise in Jammu and Kashmir of which 4307 were “own Account Enterprise”, 1790 were ‘Non Directory Establishment’ and 221 were Directory Establishment. (India: 1188863 hotels and restaurants comprising 744591 OAE, 363354NDE and 80918 in DE categories)

Out of total hotels and Restaurants enterprise in Jammu and Kashmir, 2432 hotels were in rural area whereas 3886 were in urban areas.

The “Own Account Enterprises” are defined as those enterprises which are owned and operated with the help of household labour and the Establishment are those which employ hired workers. The Establishment can further classified in to two categories“ ‘Non Directory Establishment’ and ‘Directory Establishment’.

In Jammu and Kashmir, employment in Hotel and Restaurant Enterprise were 13,785 of which 6524 were in OAE, 4497 were in NDE and 2764 persons were employed in DE sector.

Out of total employment in Hotel and Restaurant sector 9869 people were employed in urban area while 3916 were employed in rural areas.

Tourism is highly labour intensive in comparison to other sectors of economy. WTTC and PHDCC Study indicate Rs 10 Lakh spent on Hotel and Tourism Industry generate 89 jobs while in agriculture it generates 45 jobs and manufacturing 13 jobs. The Labour Capital Ratio was calculated at 1985-86 Prices. In 1994-1995, the direct employment in Tourism Sector was 2.4 per cent of the Total Labour Force. The Tourism Industry as a whole, taking all segments together, ratio is 47.5 jobs, still higher than other sectors. According to industry sources 1.2 international tourists provide employment to one person while 17 domestic tourists generate employment to one person.

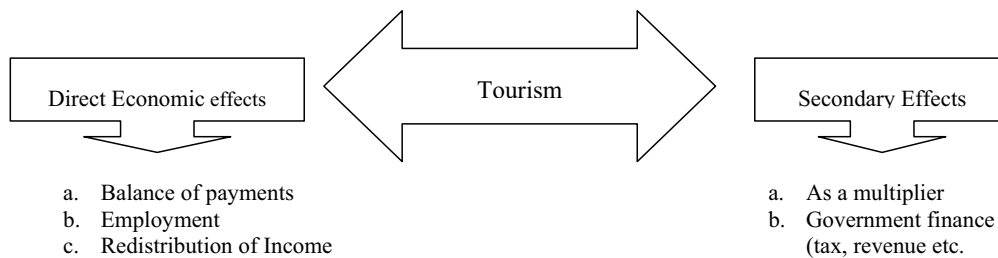
Generation of Employment on the Implementation of Tourism Development Plan

The total mid year working force as estimated by the State Directorate of Economics and Statistic, (1970-71) was 1,454,859. The state's income at the current price in that year turned out to be Rs. 2,259.4 million. The income ratio, therefore, works out to 1,667.6:1 which is to say that the creation of one unit of employment is associated with a state income of Rs. 1,667.6. This suggests that tourist sector have accounted for employment of about 1,57,000 to 1,76,000 persons in the state.

It provides economic benefits to almost all segment of the society like women, educated, uneducated, skilled, unskilled labour forces and it will also provide employment opportunities to the habitants of remote and backward areas.

FIGURE NO. 10.2

Micro Economic Benefits of Tourism in Jammu and Kashmir



The economy of Jammu & Kashmir lies heavily on tourism sector, entire state is full of colourful rocky mountains, valleys, trekking trail, several high rising chortens, snowy mountains, medows of flowers, lakes, garden and orchards, monuments and mandirs and forts and palaces, Ladhak is famous for its spectacular caves, monasteries etc. Jammu is famous for its temples. All these create tremendous economic potentialities in future. As mentioned earlier, tourism industry has played an important role in the development of the economy of the state as a whole. The economic activities are generated in the primary, secondary and territory sector of the valley. Hence tourism generated employment may be classified in to three major heads one is direct employment that sell goods and services directly e.g. hotels, restaurants, shops etc. Second one is indirect employment, which generally supplies goods, services to the tourism business and thirdly investment related employment in construction and other capital goods industries.

Tourism definitely generates employment though it is difficult to measure calculate the number and the types of employment as these jobs are scattered across many sectors and cannot be easily identified.

The greatest numbers of tourism jobs are found in the major central areas but it can be said that most of the job would be created in service sector like hotels and restaurants and travel & transportation etc. Mainly three main areas of employment are

- ✓ Hotels and similar establishments and restaurants
- ✓ Passenger transport
- ✓ Distributors of the tourist product i.e. travel agency, tour operator, guides and reception staff.

Consideration are given on all the above mentioned sectors for projecting the employment estimation in next twenty years and it is projected that nearly 25 people would get direct employment per 1000 tourist and 125 persons would get indirect employment per 1000 tourist in that basis total 34.062 persons would get employment in the end of 2020 in entire Jammu and Kashmir.

TABLE NO. 10.2

Generation of Employment on the Implementation of Tourism Development Plan

Year	Additional Tourist Inflow (In lakhs)	Direct Employment (in lakhs)	In-Direct Employment (In lakhs)	Total employment col. (2)+(3)
1	2	3	4	5
2002	62.83	1.57075	7.85375	9.4245
2003	67.43	1.68575	8.42875	10.1145
2004	72.36	1.809	9.045	10.854
2005	77.66	1.9415	9.7075	11.649
2006	83.36	2.084	10.42	12.504
2007	89.48	2.237	11.185	13.422
2008	96.06	2.4015	12.0075	14.409
2009	103.13	2.57825	12.89125	15.4695
2010	110.73	2.76825	13.84125	16.6095
2011	118.91	2.97275	14.86375	17.8365
2012	127.7	3.1925	15.9625	19.155
2013	137.16	3.429	17.145	20.574
2014	147.34	3.6835	18.4175	22.101
2015	158.29	3.95725	19.78625	23.7435
2016	170.09	4.25225	21.26125	25.5135
2017	182.78	4.5695	22.8475	27.417
2018	196.46	4.9115	24.5575	29.469
2019	211.2	5.28	26.4	31.68
2020	227.08	5.677	28.385	34.062

Average Period of Stay And Expenditure Pattern

As per the quick survey in Jammu and Kashmir, the average number of stay of foreign and domestic tourist varies from place to place like in valley average day of stay of Domestic tourist is for 5 days

and foreign tourist 10 days. In Ladakh average day of stay of Domestic tourist is for 2-3 days and foreign tourist 10 days and in Jammu average day of stay of Domestic tourist is for 4-5 days and foreign tourist stays on an average 2 to 3 days. Average per capita per day expenditure were Rs. 300/- and in case of foreign tourist the average per capita per day expenditure is Rs. 2800. /-. In below given table total day wise expenditure made by both foreign and domestic tourists in the different places i.e. Jammu, Kashmir and Ladhalh has been given.

TABLE NO. 10.3

Direct Benefits from Additional Tourist Arrivals after Implementation of the Tourism Development Plan

Year	Additional Tourist Inflow (In Lakh)			Direct Receipt from the Domestic and Foreign Tourists (Rs. In crore)	Value added at a factor of 0.3 (Rs. In crore)	Total direct benefit (col. 5+6) (Rs. In crore)
	Total	Foreign	Direct			
1	2	3	4	5	6	7
2002	62.83	3.71	59.12	1347.85	404.35	1752.21
2003	67.43	4.00	63.43	1450.89	435.26	1886.16
2004	72.36	4.31	68.05	1562.70	468.81	2031.51
2005	77.66	4.64	73.02	1684.17	505.25	2189.42
2006	83.36	5.00	78.35	1816.27	544.88	2361.15
2007	89.48	5.40	84.07	1960.12	588.03	2548.15
2008	96.06	5.83	90.22	2116.95	635.08	2752.04
2009	103.13	6.30	96.82	2288.17	686.45	2974.62
2010	110.73	6.81	103.92	2475.35	742.60	3217.95
2011	118.91	7.37	111.53	2680.28	804.08	3484.37
2012	127.70	7.98	119.71	2904.99	871.49	3776.49
2013	137.16	8.66	128.50	3151.79	945.53	4097.32
2014	147.34	9.39	137.94	3423.27	1026.98	4450.26
2015	158.29	10.21	148.08	3722.44	1116.73	4839.18
2016	170.09	11.10	158.98	4052.69	1215.80	5268.50
2017	182.78	12.09	170.69	4417.90	1325.37	5743.28
2018	196.46	13.18	183.28	4822.55	1446.76	6269.31
2019	211.20	14.39	196.81	5271.71	1581.51	6853.23
2020	227.08	15.73	211.35	5771.26	1731.38	7502.64

[Note: 2= Total number of tourist, 3= total number of foreign tourists and 4= total number of domestic tourists in Jammu, Kashmir and Ladhakh]

INDIRECT BENEFIT

Indirect benefit is related to various other aspect of tourism, it generally occurs due to multiplier effect depending upon the spending of tourist. The additional resources so generated in other sector leads towards indirect output to the tourism sector. On multiplying the direct receipts by the respective multiplier and the net value added multiplier by the respective income multiplier provides the information about the indirect benefit on the proposed investment.

The Department of Tourism (Planning and Measurement Method) has adopted Output Multiplier at 1.058 and income multiplier at 1.412 in 1993. On same analogy, indirect benefit from additional tourists arrivals are given below.

TABLE NO. 10.4
Indirect Benefit from Additional Tourist arrivals on the implementation of
Tourism Development Plan

Year	Direct receipts (in crore)	Direct value added Rs in crore)	Output (Rs. In Crore [Col.2 factor of 1.058]	Value added (Rs. In crore [Col. 3 x factor of 1.412]	Total Rs. In Crore [Col 4 + 5
1	2	3	4	5	6
2002	1347.85	404.35	1426.0253	570.9422	1996.9675
2003	1450.89	435.26	1535.0416	614.58712	2149.6287
2004	1562.70	468.81	1653.3366	661.95972	2315.2963
2005	1684.17	505.25	1781.8519	713.413	2495.2649
2006	1816.27	544.88	1921.6137	769.37056	2690.9842
2007	1960.12	588.03	2073.807	830.29836	2904.1053
2008	2116.95	635.08	2239.7331	896.73296	3136.4661
2009	2288.17	686.45	2420.8839	969.2674	3390.1513
2010	2475.35	742.60	2618.9203	1048.5512	3667.4715
2011	2680.28	804.08	2835.7362	1135.361	3971.0972
2012	2904.99	871.49	3073.4794	1230.5439	4304.0233
2013	3151.79	945.53	3334.5938	1335.0884	4669.6822
2014	3423.27	1026.98	3621.8197	1450.0958	5071.9154
2015	3722.44	1116.73	3938.3415	1576.8228	5515.1643
2016	4052.69	1215.80	4287.746	1716.7096	6004.4556
2017	4417.90	1325.37	4674.1382	1871.4224	6545.5606
2018	4822.55	1446.76	5102.2579	2042.8251	7145.083
2019	5271.71	1581.51	5577.4692	2233.0921	7810.5613
2020	5771.26	1731.38	6105.9931	2444.7086	8550.7016

COST BENEFIT RATIO

The cost benefit ration is based on the assumption of total benefit (both direct and indirect) from additional arrival in next 20 years and dividing it with total expenditure proposed to be occurred in next 20 years in various activities i.e. infrastructure creation and maintenance, providing social services etc. The expenditure is divided in to different phases i.e. 2003-08, 2008-2013, 2013-2018 and 2018-2020 likewise the direct benefit is also divided in to similar phases, the benefit cost ratio reflects the high return on the proposed Tourism Investment Plan.

TABLE NO. 10.5

Total Benefit From Additional Tourist Arrivals on the Implementation of Tourism Development Plan

Year	Total direct benefit (Rs. In crore)	Total in direct benefit (Rs. In crore)	Total Benefit [Col. (2)+(3)]
1	2	3	4
2002	1752.21	1996.96	3749.17
2003	1886.16	2149.62	4035.78
2004	2031.51	2315.29	4346.80
2005	2189.42	2495.26	4684.68
2006	2361.15	2690.98	5052.13
2007	2548.15	2904.10	5452.25
2008	2752.04	3136.46	5888.50
2009	2974.62	3390.15	6364.77
2010	3217.95	3667.47	6885.42
2011	3484.37	3971.09	7455.46
2012	3776.49	4304.02	8080.51
2013	4097.32	4669.68	8767.00
2014	4450.26	5071.91	9522.17
2015	4839.18	5515.16	10354.34
2016	5268.50	6004.45	11272.96
2017	5743.28	6545.56	12288.84
2018	6269.31	7145.08	13414.39
2019	6853.23	7810.56	14663.79
2020	7502.64	8550.70	16053.34

TABLE NO. 10.6

Phase wise Cost Benefit Analysis of Jammu Kashmir Perspective Plan

Year	Total Benefit (Direct and Indirect)	Phase wise Expenditure	Net Benefit
2003-08	29460.18	20801.85	8658.33
2008-2013	37553.18	46691.25	-9138.51
2013-2018	56852.70	37239.00	19613.70
2018-2020	30717.13	10122.8	20594.33
2020-2023	-	15184.2	

Role of Women in Tourism

Worldwide the trend is that organized activities in tourist business, trade or industry has involved the participation of women in a big way. Not only have women added to the glamour of industry but as partner to the entrepreneurship women have come to the recognition playing a major role in promoting the generation of revenues and provide leadership in the hospitality service.

However, the situation is quite unique in the State of J&K. Extensive field inquiries show that women entrepreneurship is of a high order existing in the Ladakh region, women have a fair share of participation in the hospitality services undertaken in Jammu region and there is virtual no participation in women entrepreneurship in Kashmir region. The one single exception is that handicraft sector of the industry, women have a significant share in the manufacturing of handicrafts which finally are moving out of the State through the tourist traffic.

The hospitality services in Kashmir Valley are male dominated. Women are still not well represented in training programmes which provide trained personnel to man the various sectors of the tourist industry. The number of lawyers, chartered accountants, hotel managers, transport owners, etc are all headed by men in the Kashmir Valley. The situation in Ladakh region shows that many of the hotels and many of the tourist taxi services are being managed by women entrepreneurship. The problem seems to be based on cultural and traditional values of the three regions and it would not be appropriate to push for very dramatic changes. The Consultants would like, therefore, to recommend the following :-

The Government may consider special incentives in loans and financial aids for those enterprises developed in the tourist industry which have majority partnership involving women. Lower interest rates may be charged for loans in which women entrepreneurship is direct.

Technical training institutes specially catering to young women be established which would have relations to providing trained personnel into the tourist industry.

Financial assistance through scholarships can also be provided under specific schemes which would have a voice towards female candidates. This would encourage educated women to participate in training courses and acquire technical skills.

To acquire confidence in running businesses the Government should enter into agreement with private industries located in North India and get the trained personnel attached for agreed duration of tenure postings to gain field experience in managerial skills. The State Government should also give stipends to such persons who agree to be attached in private organizations outside the State besides being paid by the private entrepreneurs a separate salary which would be agreed upon.

Women entrepreneurship in horticulture and animal husbandry may be provided extra incentives so that the support services are further strengthened. The Consultants would like to recommend that financial institutions should regularly organize surveys in rural sector to identify talented women entrepreneurship amongst the high school and graduate level students and encourage them to develop private entrepreneurship which will support the tourist industry.

The Consultants, however, feel that for still considerable time, women entrepreneurship in the tourist industry in the State of J&K may not show encouraging signs and without making a special

mention, the women may be indirectly encouraged to participate more in public life without outraging male sensibilities which is an important factor in this region.

The Consultants have identified at least two industrial activities.

In the first instance, the Consultants recognize the presence of herbal raw material which could establish small industries for making herbal medicines or also alternately lay the foundation of an aromatic small scale industry. Rose can be cultivated commercially to extract rose oil which finds very good use in the aromatic industry. The aromatic industry has an old tradition on the sub-continent and impressed Noorjahan is credited with having discovered the method of extracting Attar from flowers. Currently this indigenous industry is based in Kannauj and is dying out. Kashmir Valley can be a likely place for the revival of the Aromatic industry because of its heavy concentration of the Muslim population which is a patron of Attar, the availability of herbal raw material as well as the tradition of rose cultivation which all materially contribute into the manufacture. Women entrepreneurship can also take inspiration from the indigenous cosmetic industry launched in North India by other Muslim women.

The Consultants would like to suggest to the Department of Industries of the State Government to explore the possibility of creating project reports in consultation with the private enterprise of Kannauj and Lucknow.

MARKETING & PROMOTION OF TOURISM

“Marketing is not about selling things. It's about making it easy for people to buy.”
- Kristin Zhivago

Tourism arises from the movement of people to, and their stay in, various destinations;

- There are two elements in all tourism; the journey to the destination and the stay including activities at the destination
- The journey and the stay take place outside the normal place of residence and work, so that tourism gives rise to activities, which are distinct from those of the resident and working populations of the places, through which tourists travel and in which they stay;
- The movement to destinations is of a temporary, short-term character, with intention to return within a few days, weeks or months.

Marketing is a continuous, sequential process through which management in the hospitality and tourism industry plans, researches, implements, controls, and evaluates activities designed to satisfy both customers' needs and wants and their own organization's objectives. To be most effective, marketing requires the efforts of everyone in an organization and can be made more or less effective by the actions of complementary organizations.

The six marketing fundamentals are as follows:

- a. Satisfaction of customers' needs and wants.
- b. Continuous nature of marketing.
- c. Sequential steps in marketing.
- d. Key role of marketing research.

- e. Interdependence of hospitality and travel organizations.
- f. Organization-wide and multi department effort.

Marketing is *the* overarching management discipline. It informs the development of new products, the enhancement of existing products and the refinement of management practices. It is a tactical tool for adjusting demand to match capacity - all-important where seasonality is a real or potential constraint on tourism. It is a powerful mechanism for ensuring cross-fertilisation between profit centres in a single operation, or for identifying symbiotic partnerships in regional strategies. It sets the benchmark for customer relationships - the interaction between the supplier and the supplied.

Marketing considerations should be at the core of every aspect of tourism. Similarly, the marketing strategies for Tourism should typically contain recommendations for parallel actions designed to improve the quality of products and service, and bring businesses in closer alignment with consumer/ tourists expectations.

Successful marketing strategies require a detailed appreciation of the product or products on offer; accurate identification of markets; an appraisal of the most efficient and effective means of communication with those markets; and knowledge of the media (including the *E* sector), mechanisms and dynamic relationships which provide the vehicles for communication. Product, market and communication are the three defining points of what we term the *marketing triangle*, and only when these elements are in complete balance can the best results be realised. The ability to manage complex interrelationships requires more than a passing acquaintance with marketing theory.

The basic aim of the marketing strategy for tourism is to ensure maximum effectiveness of promotional activity in order to strengthen and enhance J&K's position as an international tourist destination.

Product Marketing

Product marketing can be considered as an integral part of tourism marketing, it is the classification of customers according to the degree that specific types of services could appeal to them. The era of standard products and services is drawing to a close; tourism cannot evade the trend. More and more customers are seeking destinations offering personalized and memorable experiences. The range of

products promoted by J&K will have to be maintained. However, the emphasis will be placed on customization and theme development so that the organization of lead-in products and related activities and services mirror J&K's determination to offer tourists a visit they are unlikely to forget.

These lead-in products have been broken down in response to new customer needs. In years to come, they will be adapted to changes in the supply and demand for tourism products.

TABLE NO. 12.1

Products of Tourism Marketing

- | | | |
|------------------------------|------------------------|-------------------------|
| • Urban stays (summers) | • Resort stays | • Fishing |
| • Urban stays (winter) | • Health tourism | • Outdoor adventure |
| • City experiences | • Golf | • International cruises |
| • Sights and scenery tours | • Downhill skiing | • Corporate meetings |
| • Theme tours | • Snowmobiling | • Conventions |
| • Pilgrimage tourism | • Cross-country skiing | • Incentive Travel |
| • Buddhist circuits tourism | | • Adventure Tourism |
| • Lakes Circuit fro Tourism | | • Mountaineering |
| • Wild Life / Sanctuaries | | • Excursion |
| • Circuit Tourism | | • River Rafting |
| • Muslim Pilgrimage Circuits | | • Trekking |

Emphasis can be given on fast-food customers, the incentive travel market, the cruise market, the ski market, the budget hotel market, the all-suite hotel market, the inclusive tour market, the luxury travel market, the motorcoach market, the casino gambling market, etc. as these are some of the other products of tourism marketing which can appeal and attract more and more customers. These can be developed and offered to the tourists as per their demand, needs and wants and returns on investment for the investors.

Some of the Major attraction for the tourists in J&K, which needs to be exploited to full potential, are:

Adventure & Holiday Tourism

- Mountaineering
- Trekking
- Ballooning
- Rock Climbing
- White Water Rafting and River Running
- Motor Rallies

- ✚ River Rafting
- ✚ Mountain Climbing

Pilgrimage Tourism

- ✚ Buddhist Circuit- Ladakh
- ✚ Vaishnodevi Ji, Amarnath Yatra, etc.
- ✚ Expected to generate a high growth rate of in Jammu and Kashmir tourism
- ✚ Domestic Tourism is largely a part of Pilgrimage Tourism, but it has to be converted / turned into other forms of Tourism like Wildlife Tourism, Adventure Tourism, Leisure Tourism, by providing exiting offers to the tourists, etc.
- ✚ Inbound Pilgrimage Tourism is at a nascent stage

Eco-Tourism

- ✚ Responsible travel to natural areas and sustains the well being of local people
- ✚ It is further an amalgamation of interests arising out of environmental, economic and social concerns
- ✚ Those who are stakeholders/ involved – consumers, managers, native people & suppliers

Potential Places for harnessing the potentials are:

- Pilgrimage Tourism :** Gaurikund , Sudhmahadev, Mantalai
- Pilgrimage:** Katra, Shiv Khori, Charaina Devta, Dera Baba Banda, Bhutan.
- Recreation Tourism:** Sanasar , Patnitop Agar Jito, Reasi Fort, Salal Dam, Symbal Choya, Dhayan Garh, Agni Nalla, Kanthan. Sanasar , Patnitop
- Leisure Tourism :** Sanasar , Patnitop, Kud
- Adventure Tourism :** Sanasar , Patnitop

Following are the brief description of different types of tourism that are in a latest trend and demand, and these can easily get place in the in the tourism marketing policy.

New Virgin Areas

Government of India, Ministry of Home Affairs has recently declared some more a areas of Ladakh opened for International Tourism. These areas are among the outstanding feature of Himalayan

Panorama. It could be yet another destination for the global tourists. These areas are relatively more distinct for cultural and adventure tourism. While declaring the new areas of Khaltse, Nubra & Nyomo Sub-Division, Govt. of India however restricted the movement of traffic flow on 7 different tour circuits to these divisions. Minimum period required for visiting these areas should not exceed 7 days.

These circuits are :

Khaltse Sub-Division (Drokhpa Area).

Khaltsi-Dumkhar-Skurbuchan-Hanudo-Bima-Dha

Agri- Tourism

Agri-Tourism can be comparatively a new and promising trend for small farms. Simply stated, agri-tourism is the visitation of farms and ranches by those seeking to experience the place and or the agricultural products. It contributes to sustainable agriculture in three major ways:

- ✓ The visitors gain a deeper understanding of what agriculture is about because they see it up close and personal.
- ✓ The farmer or rancher becomes more acquainted with the urban and suburban visitors and develops a deeper appreciation of what they value and are seeking from the agricultural system.
- ✓ The farmer derives an additional revenue stream from the farm; something needed by most farmers and ranchers today.

Increasingly diversified tourism products consistent with customer expectations are to be offered to attract more and more tourists from different parts of the world.

Ecotourism

According to the Quebec Declaration on Ecotourism: ecotourism "*embraces the principles of sustainable tourism....*" and the following principles, which distinguish it from the wider concept of sustainable tourism are:

- ✓ Contributes actively to the conservation of natural and cultural heritage,
- ✓ Includes local and indigenous communities in its planning, development and operation, contributing to their well-being,
- ✓ Interprets the natural and cultural heritage of the destination to visitor,
- ✓ Lends itself better to independent travelers, as well as to organized tours for small size groups".
- ✓ As a development tool, ecotourism can advance the three basic goals of the Convention on Biological Diversity:

- ❖ Conserve biological (and cultural) diversity, by strengthening protected area management systems (public or private) and increasing the value of sound ecosystems;
- ❖ Promote the sustainable use of biodiversity, by generating income, jobs and business opportunities in ecotourism and related business networks, and
- ❖ Share the benefits of ecotourism developments equitably with local communities and indigenous people, by obtaining their informed consent and full participation in planning and management of ecotourism businesses.

In the field, well-planned and managed ecotourism has proven to be one of the most effective tools for long-term conservation of biodiversity when the right circumstances (such as market feasibility,

management capacity at local level, and clear and monitored links between ecotourism development and conservation) are present.

While talking about Ecotourism it can be said that it is comparatively sustainable tourism, which follows clear processes like:

- ✓ Ensures prior informed participation of all stakeholders,
- ✓ Ensures equal, effective and active participation of all stakeholders,
- ✓ Acknowledges Indigenous Peoples communities' rights to say "no" to tourism development - and to be fully informed, effective and active participants in the development of tourism activities within the communities, lands, and territories, and
- ✓ Promotes processes for Indigenous Peoples and local communities to control and maintain their resources.

Rural Tourism

Rural Tourism is one component of a broader initiative to improve the economic and social life of the local people and to enhance the environment. Following a description of both the process involved in developing the programme and the tourist product itself, significant features of rural tourism's approach are crucial to long-term success and sustainability are identified.

These include encouraging maximum community involvement at all stages of development; the use of expert "partners" to provide needed technical and financial resources to rural communities; complementary strategies addressing tourism, agriculture and the environment; and a clear strategic planning and implementation framework. These elements of a successful project could be adapted and applied in a variety of locations.

The challenge of securing the economic benefits of tourism development while ensuring the protection of the environment and local culture is one that confronts governments, NGOs and citizens throughout the world. Long an issue for cosmopolitan capitals and popular tourist destinations, it has become a concern for small, relatively obscure communities as well. Many small towns and villages where agricultural incomes have been declining for decades, with concomitant decreases in employment opportunities, population and services, look to rural tourism as a means of economic revitalization. Governments of both “developed” and “developing” nations often include a form of rural tourism in their national tourism plans, seeing it as a means of alleviating stagnant or deteriorating economic conditions. At the same time, there appears to be a growing market for rural tourism, with an increased number of independent travelers seeking an “individual” experience in the “unspoiled” countryside. Yet the challenge remains:

- ✓ To develop a rural tourism programme that will attract visitors, and enhance the economic welfare of the host community, while promoting environmental protection and respecting the local heritage and culture.

Why Rural Tourism?

Rural tourism programmes are most successful at achieving economic, environmental, and cultural benefits when they are sensitively tailored to meet the needs of the affected community.

With the enormous cultural and environmental diversity represented in rural tourism today, a programme that is appropriate to one community may well be unsuitable to another. Nonetheless, by analyzing a successful case of rural tourism development, it may be possible to identify strategies and processes that could be effective if adapted to the specific needs of other communities.

Previously also Programmes of Rural Tourism have been developed in Tuscany as part of Italy's "Agri-tourism" project, by France's Association of Tourism in Rural Spaces, by Austria's Association for Regional Self-Reliant Development, in Ballyhoura and Fermanagh, Ireland, and in Fiji, Senegal, and Tyrrell County, North Carolina, in the United States. Financial and technical assistance for localities ranging from the Akamas Peninsula of Cyprus to Mongolia has been provided by such institutions as the World Bank, the European Union, and the World Tourism Organization. These programmes are successful and can be replicated.

Potential Marketable Products in J&K

It is a fact that J&K has tremendous potential marketable products. This has been reverberated through our survey in the different regions of J&K. If we see each district from the point of view of Tourism, each district has so much to offer that the other states just cannot match. We have identified the potential marketable products to be :

- Vast Natural Resources.
- Adventure Tourism (River Rafting, Mountaineering, Mountain climbing)
- Numerous trekking routes
- Pilgrimage Tourism (Muslim, Hindu, Buddhist)
- Wild Life tourism
- Heritage Tourism (Protected villages - to preserve their identity)
- Springs
- Festivals & Cultural activities
- Handicrafts, etc.

These products could only be exploited well if there is a well-laid Tourism Marketing Policy, which the state Government has to adopt in the short term, medium term and long term. If the state has so much of products to offer then it has to portray its resources to the target customers. From the survey

findings it is clear that most of the Gujaratis (tourists from Gujarat), Marathis (tourists from Maharashtra), Bengalis (tourists from West Bengal), come to J&K in large nos. So the tourists of these states could be our target customers in the short term. We have to open up offices in these states in the major locations which can provide the tourists information about the tourist places, provide various options for accommodation, chalk out travel plans, do bookings, etc.

Further, the Identified products can be made marketable if investments are made in the following infrastructures, for making the products marketable and attractive to lure tourists:

- * Up gradation / Improvement of Airport Facilities and Setting Up of an International Airport
- * Operation of Air/ Helicopter Feeder Air Services to Existing and Virgin Tourist Areas
- * Local Transport, Luxury Buses/ Taxis, etc.
- * International Standard Hotel Accommodation
- * Recreational Facilities
- * Golf Tourism
- * Setting up of Gondolas/ Cable Cars/ Rope Ways in Pahalgam, Sonamarg, Patnitop, etc.
- * Turnkey Development Of Resorts
- * Incentives

These can be further elaborated or segmented keeping in view the potential and the expected growth of Tourism. Areas of Investment are:

- Local Transport
- Modern International Level Luxury Sight Seeing Coaches, Air-Conditioned Cars And Mini Buses
- International Standard Hotel Accommodation
- International Standard Hotel Chains.

There are possibilities of taking over of some existing properties for up gradation setting up of independent units

- Turnkey development of resorts in totally virgin areas which have tremendous Tourism Potential but are presently devoid of tourist activities.

The resort of Bungas, Aharbal circuit, Yousmarg, Sanasar, Mantalai, Wardwan, Gurez and Tilel valleys could attract tourists in the ratio of 80% local/ domestic tourists and 20% from outside/ foreign tourists.

- Recreational facilities
Amusement Parks, Health Clubs, Indoor Skating Rinks, Bowling Alleys, and so on.
- Rope Ways
Gondola in Gulmarg, Cable Car and other Rope Way Systems in different Tourist Areas.
Gondola/ Cable Car at Pahalgam, Sonamarg, Patnitop, and Bagh-a-Bahu-Mahamaya in Jammu.
- Winter Sports as has been in the case of Gulmarg.
Setting-up and Operation of Multi-National Hotel Chain Units such as Holiday Inn, Sheraton, Hyatt, etc. Setting-up and Operation of Recreational Facilities such as Bowling Alleys, Indoor Ice Skating Rings, Amusement Parks, Health Clubs and so on
- Heli-Skiing & skiing.
- Trekking, Camping, Glacier - walking, Horse riding, Rock - climbing, Angling
- Helicopter Charter Service for Important Destinations from Leh
 - 1.Kargil
 - 2.Padum (Zanskar Valley)
 - 3.Nubra Valley
 - 4.Pangong Lake

5.Tsomoriri Lake

6.Nun-Kun Area (Suru Valley)

Strategies for Product Marketing

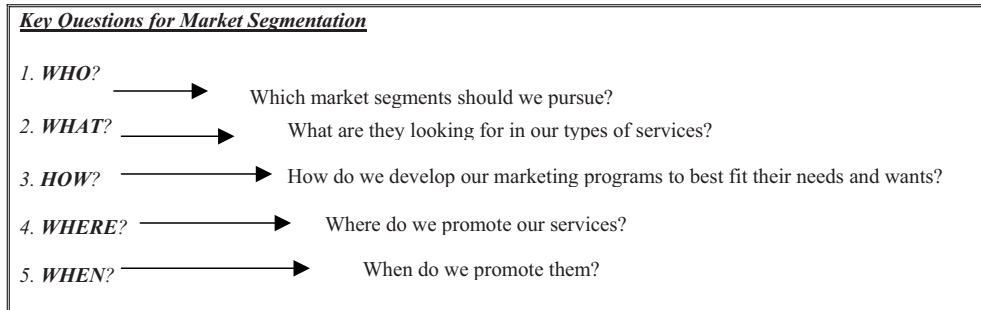
The public's shifting wants; needs, and preferences during the past 20 to 30 years have opened up a vast store of new marketing opportunities. The hospitality and travel industry has responded with an exciting array of services tailor-made for specific target markets—the industry has to learn to practice market segmentation. Ten specific marketing product strategies could include the following:

1. Increased emphasis on frequent travelers
2. Greater attention to nutritional and fitness needs
3. More marketing to executive and luxury travelers
4. Greater emphasis on weekend packages and other minivacations
5. More attention to women business travelers
6. Greater emphasis on longer-stay travelers
7. More pricing and rate alternatives
8. Greater convenience in services provided
9. Greater variety of ethnic food offerings
10. Increased supply of specific travel offerings

Segmentation

Market segmentation is one of the core principles of marketing. The basic reason for market segmentation is that trying to appeal to all potential customers—the untargeted approach—is wasteful. There are groups of customers who are just not interested in buying our services. The essence of good marketing is to pick out the segments that are most interested in specific services and to aim marketing programs at them.

The principal reason for segmentation, therefore, is to focus effort and marketing the currency in the most effective way. There are several choices to be made, and it is helpful to think of the answers to the *who, what, how, where, and when* questions:



The hospitality and travel industry has to mature in its use of market segmentation. There is growing recognition of the need to select specific target markets and to aim marketing programs at them. At the same time, the market has to become increasingly diverse, offering more and more possible niches for hospitality and travel marketers. As the industry moves into the twenty-first century, the big winners are most likely to be those organizations that hone in most precisely on their target markets. Improved marketing research and greater use of computer technology hold great promise for more effective segmentation in the industry. More applications of multi segmentation also hold good potential for more effective marketing.

Strategy of Market Segmentation

While designing the marketing strategy for tourism, it becomes necessary to segmentize the different marketing products as it plays a key role in selecting and detailing a marketing strategy. In fact, deciding on a marketing strategy usually involves choosing a single target market or some combination of target markets, or, alternatively, consciously deciding to ignore segment differences (**undifferentiated marketing**). As tourism industry comprises multiple factors, selecting target

markets for attention is usually a multiyear decision that is subject to annual reviews using the situation analysis and marketing research.

Segmentation of Tourism marketing can be done on the following seven broad categories:

1. Geography
2. Demographics
3. Purpose of trip
4. Psychographics
5. Behavior
6. Product-related
7. Channels of distribution

Each of these seven categories includes several alternative characteristics for carving the market into segments.

Only segmentation of market is not enough but it also requires the focus on the markets for which the segmentation is being done and this requires following aspects like:

1. Measurable
2. Substantial
3. Accessible
4. Defensible
5. Durable
6. Competitive
7. Homogeneous
8. Compatible

Benefits of Market Segmentation

The segmentation of market in Tourism sector is vital as it provides following benefits:

1. More effective use of marketing rupees
2. Clearer understanding of the needs and wants of selected customer groups
3. More effective **positioning** (developing a service and marketing mix to occupy a specific place in the minds of potential customers within target markets)
4. Greater precision in selecting promotional vehicles and techniques (e.g., advertising media, sales promotion methods, geographic placement)

The budget hotel concept provides a good example of these benefits. It is realized that there are groups of travelers that are not interested in the full range of services provided by the typical, one or two star hotels. These potential customers want inexpensive, clean, and comfortable lodging in limited-service and conveniently located properties. By catering to economy-minded travelers, the concentration could be on these customers' needs, chose the best ways to appeal to them, and prompt in the right places at the right times. The *no-frills* concept can also been used successfully by other hospitality and travel organizations.

Positioning

Positioning is the development of a service and marketing mix to occupy a specific place in the minds of customers within target markets, also known as having distinctive service features.

Positioning is very essential in today's competitive tourism climate because of the following :

- a. Perceptual processes : *Perception* is how the customer sizes up a product or service by the use of the five senses: sight, hearing, taste, touch, and smell. Perception plays a very important role in decision for choosing a destination.
- b. Intensified competition : Due to the intensified competition it is very necessary how the tourist destination is positioned in the minds of the customers. If the positioning is in conjunction with the needs and wants of the customer then only the customer chooses the destination.

- c. Volume of commercial messages : There are various kinds of messages which the tourist come across while choosing the destination, so the positioning should be so which is unique and satisfies the tourist.

Steps for Positioning

The steps required for effective positioning (the five Ds) are as follows :

- a. Documenting : Documenting all the various alternatives which best suit to the destination.
- b. Deciding : Deciding on the best alternatives to go in for positioning.
- c. Differentiating : Distinguishing each of the decided alternatives.
- d. Designing : Designing a plan and an implementation strategy
- e. Delivering : Delivering the alternatives to the target customers.

Approach to Positioning

Positioning can be done with six different approaches which are as follows :

- a. Positioning on specific product features
- b. Positioning on benefits, problem solution, or needs
- c. Positioning for specific usage occasions
- d. Positioning for user category
- e. Positioning against another product
- f. Positioning by product class dissociation

Marketing Abroad

We are now providing the five strategies that J&K should adopt for increasing its visibility on the world tourism map. For J&K it is one of the major challenge due to the peculiar law and order situation.

TABLE NO. 12.2

FIVE STRATEGIES TO INCREASE J&K's VISIBILITY ON THE WORLD TOURISM MAP

1 Development and organization of a tourism product in keeping with customer expectations

Faced with escalating competition and the need to satisfy customers with an increasingly broad range of interests, J&K has no option but to offer a tourism product that is competitive and innovative. Both the development and the organization of the tourism product are instrumental in the success of promotional strategies.

2 Adjusting promotional strategies to new information and communications technologies

There is a great upheaval in the world of communications, prompting major changes in consumer behaviour, especially noticeable in travel planning and reservations. J&K will have to adopt a promotional approach consistent with these new tendencies.

3 Emphasis on markets offering the best return on investment

Although deemed satisfactory, J&Ks performance could improve on some international markets offering development prospects. Such is the case of the American market (except for New England) and several European markets. J&K should focus investments on markets generating the most revenue. In the domestic front the states of Gujarat, Maharashtra, West Bengal are the major states for greater emphasis on market offerings.

4 Establishing a strong business relationship between Tourism department of J&K and the tourism industry in J&K.

In light of the growing number of players showing heightened interest in tourism, current promotional investment is now spread too thinly. Partners must be grouped together to increase the impact of J&K's tourism industry on foreign markets.

5 La connaissance des clientèles et l'évaluation des résultats

Setting up a customized tourism product for constantly evolving and increasingly discriminating clienteles and the success of promotional strategies depend on two things:

- ✓ Improving our knowledge of client needs and interests;
- ✓ Rigorously assessing the results obtained.

The recent mid-term review of the economy suggests that tourism sector need constant promotion to ensure growth since it has a high employment potential. Planning Commission has recognised tourism as a priority sector as it will be able to maximise the productivity of India's natural, human, cultural and technical resources by providing in targeting ten million employment opportunities per year. It is labour-intensive and cottage or small industry-based sector capable of being primarily focused on rural areas with relatively low cost of programme with extensive forward and backward linkages that build overall income and employment, especially for women, youth and disabled persons.

Tourism can harness its economic benefits to a large segment of its population throughout the country as also to project its vast and varied art, culture, heritage and natural resources before the world in a meaningful way. Tourism worldwide is growing fast and it comes under the five top export categories for 83 per cent of the countries and the main source of foreign exchange earnings for at least 38 per cent of them. International tourism receipts account for roughly 8 per cent of the total export earnings on goods and services globally and is the highest among all international trade categories.

India accords top priority to the tourism sector. Seven 'S' are identified to provide the requisite thrust to tourism development in our country. These are - *Swagat* (Welcome), *Soochana* (Information), *Suvidha* (Facilitation), *Suraksha* (Safety), *Sahyog* (Cooperation), *Samrachana* (Infrastructure Development) and *Safai* (Cleanliness).

FIGURE NO. 12.1

S

- * **Swagat (Welcome),**
- * **Soochana (Information)**
- * **Suvidha (Facilitation)**
- * **Suraksha (Safety)**
- * **Sahyog (Cooperation)**
- * **Samrachana (Infrastructure Development)**
- * **Safai (Cleanliness)**

Safety

Tourists travel to various destinations for relaxation, pleasure and exploration. Nothing should vitiate the atmosphere. Otherwise the tourists will go away.

Cheating, fleecing and maltreatment of tourists bring a bad name to the country. India is counted as one of the unsafe destinations by international tourists. Often there are reports of atrocities and harassment of foreign tourists by unscrupulous elements. That foreign tourists are sometimes physically harassed, robbed and even murdered cannot be denied. There are also reports of exploitation of international travelers by some unauthorised tour operators. One cannot deny occurrence of such incidences in a vast country like India. But even if a very small number of such cases get publicised through the media, they tarnish the country's image. The issue relating to the safety and security of the tourists, both domestic and foreign, is important enough to be addressed urgently as any incident relating to these issues has an adverse effect on foreign tourist arrival and domestic tourist movement.

The new tourism policy should seek to ensure safety and security of the tourists. It can suggest that a section of the state police be earmarked to act as tourist police with special training for the job. Though Jammu & Kashmir, has set up Tourist Police exclusively for providing safety and security to the tourists, but the numbers are not enough to take care of such large number of domestic and foreign tourists. The efforts should be in building confidence in the tourists for their safety and their comfortable stay.

Even though the Department of Tourism, both at the Centre and in the States, is responsible for promoting tourism, these are basically law and order problems. Most of the complaints filed by the tourists being criminal in nature have to be dealt with under the existing laws. The special Tourism Force is only meant to provide service in a spirit of courtesy and hospitality. This has to be changed

and more strict laws should be made and Tourism Police Force given powers to deal matters more stringently and enforceably.

Promotion

Promotion includes all the activities that the government takes to communicate and promote its products to its target markets. The promotional mix is the combination of advertising, personal selling, sales promotion, merchandising (also known as point-of-purchase advertising), and public relations and publicity approaches used for a specific period of time.

The three principal goals of promotion are :

- a. Inform
- b. Persuade
- c. Remind

Advertising

Any paid form of non-personal presentation of ideas, goods, or services by an identified sponsor. Advertising is the medium to promote and communicate with the customers. Re-thinking the advertising strategy to reach a global market. In the face of changing times and new realities, the tourism operators should reassess their marketing and advertising strategies.

A New Media Action Plan is needed that will increase the marketing reach and lower the costs.

- ✓ Printed Materials
- ✓ Magazine Advertising
- ✓ Trade Shows
- ✓ TV & Video

The role of the media, travel agents and tour operators is vital in creating goodwill. Even in a crisis situation they can always instill confidence in the minds of the prospective tourists and encourage them to go on journeys without any fear. The Department of Tourism should make special efforts to enlist

the cooperation of the media, the travel industry and India's foreign offices in dispelling any misconception about the safety and security situation in our country.

Tourism was adversely affected in 2001 all over the world from terrorism that threatened the safety and security of tourists. The Department of Tourism, on its part, has to take requisite steps from time to time towards confidence-building among international tourists by addressing the safety and security-related issues. One such activity has been to address leading tour operators in the main tourist generating markets to allay the fear of tourists about the region. Guided by our philosophy we welcome tourists as personifications of divinity itself.

Promotion Programmes

Consideration can also be given on following aspect for undertaking the promotion Programmes

- i) The market strategy
- ii) Knowledge of marketing distribution channels
- iii) The Promotion techniques adopted
- iv) Available Budget

The proposed strategy for promoting tourism

- Advertise the old and traditional heritage of the state, the landmarks available and hospitality provided by the state by taking help of mass media
- Promote package programmes – for week or more than week
- Designing attractive leaflets, posters and pamphlets, maps and travel agent manuals and demonstrate in the key point not only in the state but other states as well like: in travel agencies, different state houses, embassies different emporiums, in exhibitions etc.
- Enlist the corporate houses, other private sectors and service organisations to develop and promote tourism

- Invite and host visits by tour operators, travel agents and travelling journalist/ writers/ photographers
- Special promotional measures in the major market countries either by personal visits to those countries or through exhibiting the advertisement materials in the embassies in the identified countries

Targeting

Targeting is one of most important marketing mix of the marketing Strategy. The right kind of tourist has to be targeted who can generate revenues for the tourism industry. To attract these targeted customers there is need of niche tourism products to be developed like:

Amusement Parks – require an appreciable size of land, which is not available now in the valley. In Ladakh area it is uneconomical with the low level of tourist traffic and short season. In Jammu region there is a potential in the suburbs of Jammu town and towards Kathua, Samba, but the proximity of the international border would offer this site as a potential to get to organise disruptive activities or a prominent target to shell. The religious tourism is unlikely to patronize the parks if created as they would be a diversion in their religious fervour and otherwise due to shortage of free time.

Ropeway – projects are uneconomical and impractical in Ladakh region. IN Kashmir ropeway projects are already indentified and underway in some instances in the valley based on the experience of the Gulmarg Gondola ropeway.A survey has already been undertaken by the state government who have identified at least 6 new sites in the Peer Panjaal range for winter sports. The development of these sites by the state government, under normal conditions will take at least one full decade. The question of their being developed presently is totally ruled out as the identified area is dominated by militant control. In Jammu the ropeway at Vaishno Devi site is the only identified and economical project. In

Doda area, because of sparse population the potential site identified near Bhadwar is totally uneconomical and is otherwise affected by short seasons.

Yoga and Meditation Centres – The meditation centres in the private sector are already working in Ladakh and Jammu region. In Kashmir valley because of very long winter conditions and their dominant Islamic culture the suggestion would not be received well for commercial exploitation.

Adventure Sports – The rivers in the state have been found to have a very limited potential for white water surfing. In Ladakh the Indus river provided white water surfing in a local stretch already in use near Neemo. The other potential site is very close to LOC and prohibited access. All the rivers in Kashmir valley have zero potential and there is non water for use for this purpose in the Jammu region.

Rock climbing – Activities are being organised in Kashmir valley. In many camping sites a potential does exist in Jammu area for opening of training centres, Similarly, rock climbing training facilities have been created in the Indus valley by the army and ITBP. Training in rock climbing using artificial rocks have a potential in all the three regions. The standard training kit of international standards is now available in India and with its retail facility based in New Delhi costs about Rs. 40.0 lakhs per set. It could be recommended that on an experimental basis 5 sets consisting of one each for Poonch, Jammu, Doda, Ladakh and Kashmir valley be considered which may be after installation put in charge of the Department of Youth Affairs and Sports. The State Olympic Association is also associated in its use. The total project will cost about Rs. 2.00 crores non-recurring and Rs. 25.0 lacs recurring cost / annum. Immediate revival of Gulmarg WSI is not recommended, as it is a direct victim of militancy. Once this problem is over the Institute will attract students for training and also staff. So the consultants have nothing more to offer; otherwise it is a viable proposition.

Casinos – may not be feasible and can be totally ruled out, since this is an Islamic influenced state and this is against Islamic culture, issue can be politically exploited to the embarrassment of the state government.

MARKETING STRATEGY AND PROMOTION PROGRAMMES

Thrust Areas For Tourism Development

Generally two types of elements attracts tourist to a place; firstly the primary elements like historic buildings, urban landscapes, museums, art gallery, theatre, sports and events and secondary elements like hotels, shops and other services, purchase of one product, Thus thrust area for domestic as well as foreign tourist in Jammu and Kashmir can be classified into following areas:

- Eco tourism – Hills, lake, mountain, wild life observation, bird watching (domestic and foreign tourist)
- Adventure tourism – gliding, yachting, skiing, mountaineering etc. (domestic and foreign tourist)
- Religious tourism (domestic tourist)
- Leisure tourism (domestic and foreign tourist)
- Crafts and villages (domestic and foreign tourist)

The prime visitor markets for tourism are

- Business travellers
- Short break holidaymakers
- Visitors to friends and relatives
- Long holidaymakers

Strategy for tourism Promotion

- i) Development of facilities, activities, physical environment and infrastructure**
- ii) Marketing the region and selling an image
- iii) Expansion of culture, sport, natural and other tourist attraction

- iv) Physical regeneration of the area
- v) Expansion of tourism resources comprising primary and secondary elements

Development of facilities, activities, physical environment and infrastructure involves investment for tourism like development of facilities, activities, physical environments and infrastructure that will have benefits for local community.

Marketing the region and selling an image would assist the attraction of industrial and commercial activities. Advertising the region engaged in tourism activities will raise the profile and visibility of the region.

Expansion of culture, sport, natural and other tourist attraction would provide a good platform for tourism development and this effort would attract more and more tourist in the region.

Expansion of primary elements (historic buildings, landscapes, sports facilities, entertainment and special events) and secondary elements (shopping, catering, accommodations, transportation) would be the key element for the tourism promotion

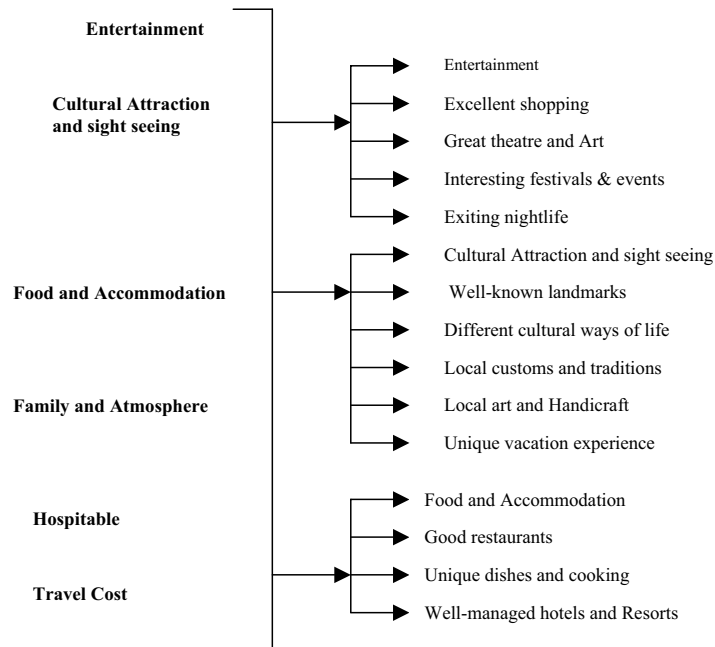
Marketing Strategy

- i) Advertisement through mass media, posters and billboards
- ii) Design and execute locally build marketing activities: distinctive features and advantages
- iii) Develop the perception of Jammu and Kashmir as a major tourist spot
- iv) Conduct marketing and promotional activities targeted at market segment identifying on going market research
- v) Confidence building in terms of security
- vi) Develop attraction of large and high quality (refer figure 1)
- vii) Coordination of Government and Private sector (In rural areas the importance should be

given to panchayats)

FIGURE NO. 12.2

TARGETING TOURISTS



The marketing strategy should also include need to portray a favourable but realistic image of the state.

This is important to due to resent unrest and security threat.

Tourism Information Services

An important function of marketing and promotion is providing information to the tourist about different key places to visit, map for geographical idea, historical and cultural background of the area, available facilities and different types of services available (with rates), shopping points, information of other facilities like health and communication facilities, religious institutions, embassies, consulates.

The information should be provided about local customs, dress and behaviour code and security problem (specially about the terrorist prone areas).

Case Study

The SPARC (South Pembrokeshire Partnership for Action with Rural Communities) rural tourism programme

South Pembrokeshire is located in the southwestern peninsula of Wales. It is a rural area comprising roughly 40 villages and towns and 400 sq km of land. The landscape is varied, including coastal and estuarian areas that are part of the Pembrokeshire Coast National Park and rolling countryside and river valleys leading to the foothills of the Preseli Hills to the north. The “Landsker”, a historic frontier line of castles and strongholds dating to the 11th century Norman invasion, divides the area into two culturally distinct parts: to the north the Welsh culture and language predominate, while the area to the south has been anglicized. The surrounding countryside, whose villages and towns are interconnected by footpaths, bridle ways and narrow lanes, is picturesquely called the “Landsker Borderlands”.

In 1992, SPARC received European Union LEADER I funding to extend a pilot project of its predecessor organization throughout the disadvantaged rural communities of South Pembrokeshire. Its goal was to develop an integrated programme to improve the economic and social life of the local people and enhance the environment. The SPARC effort is not focused solely on tourism, but also includes inter related environmental and agricultural strategies. All three strategies have interlinkages and are seen as complementary components of the programme. The tourism strategy, as described by SPA RC coordinator Joan Asby,

(is) aimed at the discerning visitor, who is environmentally conscious, and is looking for a quality experience, and aims to promote opportunities which are seen to have positive economic multiplier effects on other local sectors, but which complement the environment and heritage of the area, thus reinforcing and facilitating the key rural development objective of agricultural diversification.

Central to SPARC ’s approach is the encouragement of maximum community involvement at all stages of development: planning, implementation and monitoring. First, local people in all 37 villages that have taken part in the SPARC programme to date participated in an appraisal to identify the problems and opportunities of their own community. Next, they helped produce a local Action Plan based on the appraisal. Most communities identified rural tourism in their Action Plans as a potential source of economic growth. They also, however, wanted a form of tourism “that was non-intrusive and which was based on the natural resources of the area, its landscape, heritage and culture.”

This translated into the SPARC goal of promoting environmentally sensitive rural tourism which would respect the local culture and bring maximum local economic benefit.

Equally important to the SPA RC approach is the assistance of a variety of “partners”, experts and organizations in relevant fields, which produced valuable data and assessments that they shared with the community and supportive public and private organizations that provided technical and financial assistance. SPARC, local communities and these partners joined forces to determine a “product identity” for the rural tourism programme: the theme of the “Landsker Borderlands”. This offered a unified historic interpretation to the South Pembrokeshire district, taking into account the linguistic split between the Welsh speakers to the north and the English speakers to the south, and respected the cultural distinction of the area.

As the tourism programme developed, local citizens, “partners” and SPARC cooperated on virtually all aspects. Local citizens from the villages and towns were encouraged, again with the assistance of specialist “partners”, to create leaflets providing information about their local heritage. Villages established or improved “amenity centres” which provide car parking and interpretative panels in the heart of the community and from which local footpath networks can be accessed. These footpaths were identified by local communities in conjunction with SPA RC personnel, joining villages, providing access to historic sites when possible and providing opportunity to walk through the varied country side.

Noteworthy features of the SPARC programme

- 1. Extensive citizen involvement**
- 2. Partnership with experts**
- 3. Complementary strategies**
- 4. Clear strategic planning and implementation framework**
- 5. The pivotal role of SPA RC**
- 6. Regional approach**
- 7. Comprehensiveness of the product**
- 8. Sensitivity to environment and culture**
- 9. Limits of “leakage”**
- 10. Diversification of the tourist product**

Conclusions

No single example of tourism is likely to be suitable in total for duplication in any other location. After all, local settings – environmental, cultural, social, political and economic – vary so significantly that a “cookiecutter” approach of cloning even a highly successful programme should not be attempted. That said, the SPARC model is characterized by numerous noteworthy features that could be adapted and applied effectively in a variety of locations. SPARC’s methods have been successful for South Pembrokeshire, and for that reason should be commended and studied by those concerned with securing the potential benefits of tourism for rural communities while ensuring the protection of the environment and culture of the local people.

RECOMMENDATIONS & PERSPECTIVE PLANNING

The Consultants are presenting the recommendations and also the perspective planning for the development of tourism in Jammu & Kashmir for the next 20 years. The recommendations are based on the survey findings and the multi pronged data collection from various levels and various departments. The recommendations and the perspective plan are presented sector wise and in phases. The financial details are presented in each sector and the summary of the financial implications are presented in the next chapter.

It is necessary that measures be initiated for the revival of tourism industry first and restore it at least to the position of the late 1980's. This means that the entire support system laid by various departments of the state government requires revival and also in a coordinated manner which in the present case is found wanting in the evaluation undertaken by us. Indeed, a major part of the 20 years perspective plan seeks first to bring about the revival in a sustainable manner and thereafter build up new perspective blocks on what has been revived and restored. The consultants are of the view that expensive schemes in promoting tourism industry in the state are currently no answer to future prosperity. This is because tourism industry should be sustainable without outside grants and this can only come about when some of the basic infrastructure of the tourism industry is properly taken care of. The growth of the tourism industry in the state has been haphazard and very little coordination appears to have existed in the past between the private enterprise and the government effort for example the development of the communication infrastructure in the past has been totally defense oriented and not tourist oriented. Where the development of the communication facilities like road were conceived, no priority was assigned to the requirement of the tourism industry and were totally dependent on the demands of the executive wing of the government who had other reasons for asking for communication facilities.

Further we feel that sustainable tourism is dependent on a large number of factors mentioned in the perspective plan which might fall outside the purview of tourism development but they would certainly have an impact on the promotion of tourism in the long run (since the mandate of this perspective plan is to develop a sustainable plan for 20 years). The consultants during their extensive field experience have found that many important projects which have a direct bearing to the international tourism into the valley have been in long slumber, though they form the proposals of various Departments, but we certainly foresee that if these projects are implemented it will certainly reinforce the perspective plan for sustainable tourism. Taking an example, The master plan for the improvement of the public infrastructure in the Srinagar city was originally conceived in the mid 1970's and was sent to the government in the mid 1980's and yet even in the year 2003 nothing out of that master plan has been put on ground while the city has degenerated into a massive slum. Interviews with tourist both Indian and foreign have clearly indicated that a vast number of tourist visiting Srinagar find it a very dirty town with no power and reliable water supply, to say the least. It is viewed that the revival of the tourism industry has to involve the revival of all the industrial activities, which are connected as the support structure. For example the consultants have recommended the revival of horticulture and food processing small sector industries simply to ensure that money and profits involved in this economic activity are not exported out of the state. The consultants see no harm at all in recommending these measures for 'sustainable' tourism industry. It would not be sustainable if the supporting economic activity is used as blackmail on the state population by any influential sector outside the state.

NEED TO WELCOME THE TOURIST PROPERLY

If the tourists are invited to the State they must be informed on what the State offers as tourist delights; sample ground survey undertaken showed that such tourist literature was in short supply; if the tourist is invited to visit the State one finds there was a lack of institutional infrastructure to facilitate the movement of the tourist and help his tours. As for safety of self there is no separate

scheme and the tourist is fearful of moving into the State away from the severe hot weather conditions of the North Indian plains for his rest and recreation. He is not welcomed particularly by the indifferent cooperation of the existing staff located outside the State, who treat their assignments as a 10-5 p.m. affair; as for the sights available in the States, they outrage the sense of public cleanliness and sanitation. The whole population needs to be educated in the art of welcoming the tourist, and it is a big task.

IMPLEMENTATION OF STATE TOURISM POLICY

We have already identified the presence of three agencies presently inter-connected which have responsibilities to plan, manage and develop the tourist infrastructure in the State. The current weaknesses existing in the system overlooking the tourism industry have also been identified. While we are emphasizing herein that there should be least presence of government in the business of tourist and the private sector should be asked to play a more direct role, yet it is necessary to have a system which should work for sometime into the future, which will institutionalize properly some of the adhoc activities which are to be found operating in the tourism industry. We also find insufficient coordination between the projects of the Government of India, Ministry of Tourism and most of the the State Government to examine and accept, there can be a situation when even in the absence of a declared policy on tourism, the State Government may still venture to accelerate development in the tourist sector and the related official activities.

The special interest shown by the Chief Minister of the State and some of the senior officers of long experience in this hospitality activity, prompts us to recommend herein which, it is hoped, would provide the necessary momentum for the early accelerated development of the tourist industry as well as act as a clearing house for contemplated projects and also oversee the individual approved projects to maintain their declared schedules of completion, etc.

We therefore recommend the creation of the State Tourism Regulatory Board (STBP). The Board shall have the following:

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Chairman	Chief Minister of the State
Vice Chairman	Minister of Tourism
Deputy Chairman	Chief Secretary, J&K Govt.
Member Secretary	Director General, Tourism
Members of Board	Secretary, Department of Finance
	Secretary, Education Department
	Secretary, Industries
	Secretary, Culture & Horticulture
	Secretary, Deptt of Transport
	Secretary, Deptt. of Planning
	Director General, Town Planning
	Director General, State Police
	Director General, Civil Defense
	Corps Commander, 14 Corps
	Corps Commander, 15 Corps
	Director General, Deptt of Archaeology, GoI
	Joint Secretary, Ministry of Tourist (Dealing with Kashmir)
	Chief Engineer, State PWD
	IGP, Border Roads, North Zone
	Secretary, Vaishno Devi Temple Trust
	Chairman, State Dharamasthala Trust
	Secretary, State Wakf Board
	Managing Director, JKSRTC
Permanent Invitees	- Director of Horticulture
	Director of Archaeology

Chairman, State Sahitya Kala Academy

Distt. Development Officer, Leh, Ladakh

Director, Civil Aviation, North India

Director, Handicrafts

President, J&K Hotel & Restaurant Association or Federation

Dy.. General Manager, Northern Railway or representative.

What may be noted here is that in our consideration we are not recommending members from the Council of Ministers. This representation only finds itself through the Chief Minister of the State whose executive powers will help in directing the policy views of the executive wing of the State Government and the State Minister for Tourism and the bureaucracy shall implement the same. It is our concern also that the executive wing of the Government does not interfere in the day to day working of such a Board which we expect to function more professionally than it is undertaking presently.

The Board shall be assisted by a State Advisory Committee on Tourism which will have at least the following representatives –

- | | | |
|----|--|-----|
| 1. | Representative from the State Bar Council | - 1 |
| 2. | Representative from the State Medical Association | - 1 |
| 3. | Representatives from the State Transport unions | - 3 |
| 4. | Representatives from the Taxi unions of Kashmir, Jammu and Ladakh regions | - 3 |
| 5. | Representatives of the State associations of tours & trekkers trade body | - 2 |
| 6. | Representative of the Power Grid Corporation | - 1 |
| 7. | Representative from the House Boat Owners Association | - 1 |
| 8. | Director, All India Radio | - 1 |
| 9. | Two Nominations of the Chief Minister who are reputed travel writers working in India and non-resident of the State. | - 2 |

The Chief Minister may add more members but the Advisory Committee should remain manageable and not exceed 21 members.

The State Tourism Regulatory Board (STRB) will replace also partly the functions of the Commissioner, Tourism which post needs to be abolished alongwith its supporting staff. The Board shall have its separate secretariat and will function as an on the spot decision taking organization instead of “running files”. The Member Secretary of the Board will prepare the agenda of the meetings of the Board and give presentation on the items of the agenda before the assembled members of the Board who will take decisions in the seating of the Board which will be implemented and the Board shall be reported back on the progress or delays, and all such matters shall be decided in such proceedings.

In short, we conceive the State Tourism Regulatory Board on the pattern of functioning of major industrial undertakings in the private sector. The spirit of such a role model is essential to overcome the many bottlenecks which are currently seen in the implementation as well as accountability of government projects.

We further recommend that the STRB be sustained by the public and private sectors on a cost-sharing basis. There shall be a budget for this Board and the share of expenditure will be borne by the State Government and the private sector in the ratio of 66:34 and after a period of 10 years of working, the State share will be reduced to 51 percent. The revenue from the private sector for managing the Board will come from octroi's charged on identified activities related directly to promotion of tourism like area octroi, road cess, restaurant annual registration fee, tehbazari on roadside vendors operating in municipal and NAC limits, fuel cess, etc.

The STRB, amongst identified activities, is considered to undertake the following-

- To receive and disburse finances received from the Government of India and other funding agencies to approved projects which directly or indirectly help in the development and sustenance of the infrastructure of the tourist industry in the State of J&K.

- Provide equity support for capital intensive projects sponsored by the State for the development of tourism.
- Advise the State Government on the exemption or levy of taxes and cess to specific sectors of the tourist industry.
- Provide assistance of technical nature to organizations both public and private, which will carry tourists to destination from all parts of the country into the State.
- To scrutinize projects, finalize or coordinate the requirements of various other departments of the State Government in the development of tourist projects or systems in the State.
- To identify projects for the private sector and guide them to their fulfillment.
- To create the policy on management of the tourist industry and review the policy from time to time.
- To undertake all activities to support inter-state projects or attracting into India as well as share the destination with the State of J&K.
- To design and approve training programme and studies to train persons to become efficient managers in the tourism industry and create training centres of merit.

The Consultants also advise that the STRB reserve employment slots for a small number of advisors who may be employed on contract basis and who are well-known in their specific professions.

The Consultants also do not advise the re-employment of State employees in this category for reasons of professional efficiency and other considerations.

The Consultants recommend further that in case this proposal meets with the general consensus of the State Government, then the Chief Minister may ask the State Institute of Public Administration to undertake the detailing of the functioning of such a Board and present a scheme of an alternate autonomous body which will function better than the current three organizations on ground, namely, the offices of the Director General of Tourism, the J&KTDC and the Commissioner, Tourism.

FINANCING & BANKING

After taking all factors into the consideration, we recommend the following :

- a. All nationalised banks in the State jurisdiction should be asked to reopen their branches within this year and a time deadline set for them.
- b. National banks should solicit business from clients with whom they had earlier business dealings.
- c. The procedure to provide soft loans be simplified and collaterals may only be insisted in doubtful cases. Rules may be reinterpreted by bank headquarter to relax the restrictive cilling provided in the powers of the bank managers.
- d. The Ministry of Finance may like to advise the management of the nationalised banks to order a review of all posts currently unfilled or inoperative because of absentism and give a call to employees to return to work. Where vacancies persist, they may be filled by fresh recruitment and the banking services in branches be resumed in phases.
- e. Appoint new licensees to undertake foreign exchange transaction. Foreign exchange facilities should exist in all recognised centres of tourism in the three broad regions of the State.
- f. The Department of Banking should consider issuing new guidelines to provide technical services to small entrepreneurs who wish to either start a new business or revive an old project.
- g. ATM services should be opened separately for local bank accounts by Bank of J&K at branches located at main tourist centres. The nationalised banks may take independent decision to open new ATM Services connecting them to national network for their clients visiting the State of J&K as tourists.

CIVIL AVIATION

For the Srinagar airport following recommendations are to be implemented.

Upgrade Srinagar Airport

The Consultants recommend of the consultants is that the Ministry of Civil Aviation, supported by the State Government of Jammu and Kashmir and the Ministry of Tourism, begin placing on ground, the planned expansion facility for Srinagar airport without waiting for the first rush of passengers which would otherwise immediately lead to bad publicity and harassment of passengers.

No expenditure is identified in extending the airstrip to received wide-bodied jumbo jet aircrafts. What is required has already been planned as new holding areas to handle simultaneously at least two airbus vehicles, additional checking counters for officials and additional expected airlines,

luggage holding areas, passenger vehicle parking base, reception areas etc. The extent of expenditure has also been identified in the expansion plan of Srinagar airport, but all expenditure items would have to be reviewed with present day costs and future escalations.

In the first five years, phased review of the expansion of the Airport Complex may be taken up, assigning it a priority so that the National Planning Commission could also include this item under the relevant head in the 10th Five Year Plan as appropriate. The Consultants have not assigning the expenditure component, to be earmarked for this activity by the Ministry in the Central Government or with the State Government, save with the comments that the costs of developing the infrastructure to receive the anticipated tourist influx should be borne by them proportionately, particularly the appointment of new staff and equipment meant for security services. The consultants also recommend the existing arrangements of airport security needs a total review, and against the current hostile presence of security staff at the airport, a more unobtrusive and quick handling security system should be put on ground.

Short-haul passenger traffic

The consultants find a potential to develop short haul airline traffic within the State of J&K to serve the high profile foreign and domestic tourist who would not like to waste his time travelling from one destination to another. The consultants also identified a small passenger traffic of senior officers of the State who need to also cut down their travel time and attend to inspections and management of the local offices located in areas which if the terrain was not hostile could be reached more conveniently in a part of a day rather than travelling through at least two days.

This short haul identified routes given otherwise can also be used for emergency travel using air ambulance services for the ordinary domestic tourist and could be a factor in confidence building of such tourist traffic when the more remote areas of tourist interest are opened for entry.

The State of J&K have not opened the region for private airline operators to run air taxi within the State using the airstrips already available. Perhaps this was either for security conditions, or for suggestions that this did not invite business interest.

Can there be a state airline service?

The consultants now offer a proposal to the state Government to examine if it would like to have a State undertaking which would run a State Airways System. It can be an exclusive activity

undertake as a joint venture with airlines which are already in the business of running short haul route facilities. The following routes (see map also) are identified on which a regular air taxi service can be maintained and offered to tourists who can pay for the charges and for Government officials to use, with the permission of the State Government. The routes are :

Srinagar	-	Poonch
Srinagar	-	Jammu
Srinagar	-	Leh
Srinagar	-	Kargil
Srinagar	-	Doda
Srinagar	-	Amritsar
Jammu	-	Leh
Jammu	-	Doda
Jammu	-	Poonch
Jammu	-	Chandigarh
Jammu	-	Ludhiana
Leh	-	Kullu
Leh	-	Chushul
Leh	-	Koyul/Fokse
Leh	-	Kargil
Leh	-	Chandigarh
Doda	-	Pathankot
Doda	-	Chandigarh
Doda	-	Ludhiana

In the five year's development plan the Consultants feel this suggestion requires to be examined within the State Government for its merit, for identification of funds, select priority to existing airstrips which need to be opened first under the scheme, and select the aircraft for the purpose of running the scheme.

The consultants suggest from this side two types of aircrafts to be used selectively for running the State airlines, namely the Bonanza series for the high altitude flying routes and the Donier Class aircrafts already used elsewhere in India, for flying in areas under a ceiling of 3,500 mtrs. above sea level.

The cost of aircrafts is already known officially. While the selection of airstrips and individual infrastructure will remain unique for each airstrip the expenditure would be otherwise only possible to calculate when the matter is examined further. The time factor is extendable to a period of ten years from the time when the State Government decides to take up this proposal for its first consideration.

In the first five year given, such a facility can be offered to the rich foreign tourists.

In ten years time, it is possible to see the same system on ground being consolidated.

Besides, using small aircrafts, the State Airways can also run a helicopter taxi service meant for the senior state officials. Its spare capacity can also be used for air taxi purpose by foreign or domestic tourist who can afford this facility, or be used for standby arrangement as a flying ambulance for local persons requiring emergency evacuation from distant villages or relief in natural disaster. These services can be started by extending the facilities on ground to the Indian Air Force, which has repair facilities within the State and neighbouring States.

The people in the State of J&K are looking for an increase in tourism from the Far East and South East countries. It is hoped that official and unofficial agencies should consider attracting tourists from these regions into Indian and particularly into the State of Jammu and Kashmir by assigning reputed travel agents to explore the market for in ward tourist from the Far East.

Srinagar as hub for international tourism

A new sector of traffic in foreign tourism, identified desires a proposal to develop the Srinagar Airport as an international hub of air traffic.

Culturally speaking, Ladakh and Kashmir belongs to the culture of Central Asia, but no efforts were made to attract the tourist traffic from Central Asian countries into India. It is here, the necessity is felt to move into this cultural vacuum and create a tourist traffic. Cultural affinity exists in cuisine, historical migration, music and in architecture, which should interest visitors from the Central Asian Countries.

The state government in the past has made no concerted demand to make Kashmir valley the hub of regional tourism which is currently focused on the golden triangle of Delhi – Jaipur – Agra. The consultants effort is to get the GoI to shift its focus and consider Kashmir valley as the third tourism

hub in India. Therefore a Central Asian perspective using Srinagar as the Indian destination for Muslim tourists of Central Asia has been contemplated.

Tourists from Central Asian Countries

The contemplated tourist traffic should connect the international capitals of Uzbekistan, Turkmenistan, Khirgistan, Kazakhstan and finally Afghanistan. It would be necessary to also consider an air link with Mongolia, which has affinity with the religion and monasteries of Ladakh.

Tourists from the Middle East

The consultants foresee that the internal air traffic with Srinagar Airport as its hub, should also have direct linkage with countries in the Middle East namely Saudi Arabia, Sharjah, Kuwait, Iran and later Iran and Iraq. There is really no good reason why air traffic must move through Mumbai International Airport unless the purpose is first commerce and then rest and recreation.

The salubrious cool climate of the region should itself be the selling point in international tourism in the Middle East countries.

The consultants therefore, recommend that the central Government and its different ministries namely the Ministry of External Affairs, Home Affairs, Tourism, Human Resource Development (which has the Department of Culture and Department of Sports), as well as the Ministry of Civil Aviation should all put their heads together to examine the proposed outline to open this region to tourism from Central Asian countries and Middle East.

To have an idea of the comparative location of the international capitals to be connected with Srinagar as an air link hub, please see the attached map.

The Srinagar hub will also have connectivity with the international hub of New Delhi and provide convenient switch over for tourist traffic, which may also like to move into the Golden Triangle or go even further South.

New Project studies need to taken up in the identified countries of Central Asia to find out the extent of interest in the population of these countries to journey to India for sight seeing and commerce. Thereafter it would become possible to consider a schedule of flight to test the traffic

potential in these countries. As for local facilities at Srinagar Airport the contemplated expansion plan of which mention has been made in the above paragraphs, will fulfil the requirements of locating the necessary infrastructure for an international airport.

Haj charter flights already in progress

Already charter flights from Srinagar Airport for Haj pilgrims destined to Saudi Arabia have commenced, thereby breaking the mindset in government circle that there is no potential of international traffic from Srinagar as its exclusive base. What matters now is only frequency of flights.

Air Travel to J&K and Ladakh

It is a view that visitors using aeroplanes to enter the State should have prior facility offered to shuffle their destinations, in the limited time available to them for recreation, and visit the maximum places of tourist interests.

Special Triangular destination routes

The Consultants feel that, that disregarding the limited traffic of passengers, the Ministry Civil Aviation should offer a flight schedule between May 1 and September 30 in which a triangular flight clockwise and another one anti clockwise should be organized from Jammu-Srinagar-Leh-Jammu, and from Jammu-Leh-Srinagar-Jammu each day. This should be a compulsory flight by each carrier, which touches Jammu in its daily schedule.

This route scheduling can be organized within the referential period kept in the scheme, which is within five years.

Very few tourist from South India

Incentive Air Fares

The consultants suggestion is that the Ministry of Civil Aviation issues a special ticket counterfoil to distinguish it from the regular air ticket which should be offered to the persons of the four States of Tamil nadu, Andhra Pradesh, Karnataka and Kerla in South India, in the limited time period from May 15 to June 15. This special ticket should have conditions and concessions. Its traffic fare should be without the various taxes, charged on the original fare of the flight; those tourists who show confirmed hotel booking for a minimum 04 days in Kashmir Valley or in Ladakh region, should

only be issued these tickets. Infact the cost of such tickets works out to about 40% less of the regular tickets and should be enough incentive for the distant traveler to consider visiting this area. The amount of saving could then be spent by the tourists in his local travels during sightseeing.

The consultants suggest the same scheme for those people who are residents of the “Seven Sister” States of the North-East.

No high volumes of passenger traffic are expected passing through either Srinagar or Leh airport under such a scheme; but the situation can be changed, when there is an impressive campaign to draw out the high spending tourist of South Indian States to give up his foreign travel plan, and instead come into Srinagar or Leh and into its hinter land.

It is up to the Central Government to decide, if such suggested incentive is also be extended in other areas of the country for short term, to draw out the domestic tourist.

Apex Fares

It is highly recommended that the Apex fares be brought in the fares of air travel to J&K. This would certainly benefit the tourists and would act as a booster for the air travel industry. The tourists are very sensitive about the price of transportation and if we are able to provide good airfares, then certainly it would help in bringing more tourists to J&K.

Furhter Apex fares would rationalize the number of tourists to non-peak seasons also. This would also boost in the private airlines to invest more and start new flights.

Destination specific LTC scheme offered

Currently the LTC scheme has also been withdrawn for good reasons. The consultants favour the revival of the LTC scheme for certain destinations as an attempt to push the domestic tourist covered by the farmer LTC schemes into areas, which are not well served by domestic tourism.

Infact, the LTC scheme may be destination oriented and exclusive tickets be issued from various parts of the country to reach Jammu and into the interiors. This is a suggestion offered for examination to the Ministry of Personnel and Grievances Redressal who look after the interests of employees of the Central Government.

RAILWAYS

In Ladakh the Consultants find there is a potential to create a single rail track system between Khaltse, Nimmo, Leh, Upshi, up to Nyoma which is the newly emerging township in Ladakh. The rail track will run within the Indus Valley and besides the river itself. This is a low cost project because the rail track can be laid on flat surface in the arid desert except in three areas where there are gorges and hard rock for short distance.

In the Kargil region the Consultants have identified a short rail track which can be constructed to provide an easy tourist access into Zaskar Valley. This track follows the river Suru and can be laid between Mulbakh, Kargil and Sanku. It can also at a later date be extended to Suru Village. The Sanku-Kargil Mulbekh section does not afford serious engineering problems, at the same time it connects some of the most potential tourists interest areas. The train journey will attract both the trekkers and ordinary tourists to have a unique travel experience.

These two rail link are considered to be laid on the Standard Gauge. The rolling stock will be either DMU or EMU units, of not more than three small bogies in the rake.

It is suggested that the feasibility survey on these suggested routes may be considered in the first five years of the plan.

In the first 10 years period the Ladakh rail track proposal may be developed between Nyoma and Leh.

In the first twenty years the Ladakh rail track proposal may be completed as per decided schedule.

The Kargil Rail proposal connecting Sanku and Mulbak may be taken up in the first ten years period between Mulbek and Kargil and in the first twenty years between Kargil and Sanku.

These projects will have no connection with the Kashmir Rail link.

The cost of survey for Ladakh and Kargil area is computed at Rs 30 crores for the first five years, to complete the feasibility surveys. This to be identified in the Railway budget.

Between 2008 and 2023 the cost of the project in Ladakh will work out to approximately Rs.1100 crores. In the same period the project cost on Kargil Rail based on the current level of expenditures and the engineering needs locally, will work out to roughly Rs.300 crores.

Special Note :

The Consultants have identified separate studies on the affect on environment once this proposal is under examination. In Ladakh area it would be appropriate to study the necessity to take precautions to minimise the affect of disturbing the ecology. In all the three identified areas there is no affected animal life. The level of noise pollution may be temporally high in the case of the Kargil project as it would require blasting and tunneling in some local areas. In the Valley the ecological disturbances are limited to the removal and transplanting of forest trees.

During operational period the Consultants do not foresee any adverse ecological effects. We still emphasise that in all matters involving engineering projects ecology studies should accompany.

Presently the Railway is organizing a survey for future rail link with Poonch via Akhnoor and Rajouri. This rail link closely follows the existing road to Poonch. Outside the Railway circles the work on the survey is unknown. The Consultants endorse the work contemplated by the Railways in undertaking the survey and further suggest that a local line from Jammu to Akhnoor be announced for construction at the earliest. It would be a major morale booster and would be used by the population of the area to reach Jammu more conveniently.

The Consultants further see good reasons that a survey to be contemplated between Anantnag and Pahalgam. This is a high traffic area during the season and in particularly when the Amarnath Yatra is underway. The stretch is not involving engineering complications and would be a convenient extension of regular rail traffic either as rail bus or a branch rail system between Srinagar and Pahalgam which otherwise is a high road traffic density segment in the transport system in the Valley.

The Consultants recommend the survey in the period 2008-2013 and the development of the link in the period 2013-2018. The projected cost of the construction is Rs.600 crores which includes approximately 20 kms. of mountain engineering.

The Consultants have also examined the Kashmir rail link scheme and find requirement of a rail tunnel under Banihal Pass which is to be constructed at an altitude still lower than the Jawahar Tunnel. As the frequency of trains would not be very high, the Consultant would like to suggest that the rail tunnel should also provide for a one-way road traffic and therefore the bed of the tunnel should be laid in concrete material in such a way that it is a rail-cum-road tunnel. This tunnel would be used

by light vehicular traffic while the HTV traffic will continue to use Jawahar Tunnel. The contingency alternate route of the old Banihal Pass should be used by vehicular traffic which when consigned are carried by road which are of a hazardous nature like petroleum products and explosives.

Sky Rail for Srinagar Airport

According to existing projections of the Ministry of Civil Aviation and under normal conditions of growth, it is expected that by the year 2018 Srinagar Airport would be handling alone 2 million passengers. The highest number of passengers this Airport has handled is nearly 700,000 in 1988. Old timers remember the chaotic conditions of passing through this Airport, delayed flights, extra flights and the congestion on the road due to heavy traffic on the Airport road. When the city is also observing bandhs, the taxi services also closes down as they are connected with the petty business. This results in great harassment to visitors entering the city through Srinagar Airport.

Taking all things into consideration when Srinagar Airport is expected to handle 2 million passengers annually, the problems of looking after the passenger requirements would increase manifold. The need to disperse passengers destined to pass through Srinagar Airport assume importance. As the area between the Airport perimeter and the city limits have both been increasing with new urban development underway, new transport corridors are difficult to identify. The existing airport road is also getting congested. The Consultants, therefore, have the following to suggest :-

It is felt for future that for quick dispersal of passenger traffic from Srinagar Airport, the Airport should be connected by a Mass Rapid Transport System whose other terminal would in Srinagar. The Mass Rapid Transport System would move along the existing Airport road until it enters the town and then move along the embankment of river Jhelum and terminate in an appropriate space at Khaniyar near Hazaratbal. An alternate route in the town would involve moving from the Exhibition Ground area and passing through Lal Chowk to end at the open space in front of the existing TRC, Srinagar. The proposal is to install an elevated rail sky rail system replicating the Delhi Metro system. The sky rail system as proposed would be a ground and elevated rail route of approximately 21 kms. in its entire length. At Srinagar Airport it can go underground very conveniently as the Srinagar Airport is approximately 18mtrs/ 40 ft. higher land from the general terrain level. The technology is available in the country. The experienced designers should also available and by the time such a system is initiated for Srinagar town, the use of the metro rail rail would have become common places with standard procedures for handling.

It is contemplated that such a rail system may be considered in the 10 years' phase of 2008-2018. The physical cost of survey and civil works are estimated to be Rs.630 crores. The cost of the rolling stock will have to be tabulated in the approximate time when the project is near to completion.

The proposed rail system would also help remove some city congestion besides supporting the tourist facilities on ground. Stations will have to be constructed above ground linked with the rail track. This will avoid litigation and stalling of the project due to eviction of residents in Srinagar town. There is fear of cost escalation in such a project which will depend on the state of law & order existing from time to time in this area. The Consultants would like to also suggest that at the development stage the project will provide local employment upto and extent of about 4,000 people and when it is completed, it is hoped to provide employment for two to three thousand people. The rail system is expected to handle at least 5 million passengers, each year once it is commissioned. The whole project can also be offered on a BOLT system in the private sector.

ACCOMODATION

The Consultants consideration is, that the State Deptt. of Tourism should identify service providers, get the house holders registered in villages who would be owners of one, two or even three bed rooms and convert them into living 'modules'.

These bed rooms will be of minimum size 4.25 meters by 3.50 meters. Each module will have a set of crockery for the service of lunch/dinner. It shall have a study table, chair with separate light, two side tables beside the double bed, one telephone connection, one clothe iron, clean cotton line, small amount of toiletry, special toiletry for women, solar power emergency light (where there is no power, or power is disrupted); the room should be providing sun light and warmth. There should be adequate independent room heating facilities.

The State Department of Tourism should provide the first set of standardise crockery, rooms furniture and cooking utensils depending on the total offered bed capacity.

The State Government should bear the first 50 percent cost of developing the module in which a further 25 percent investment will be of the householder in cash and the residual 25 percent of the cost will under written by a bank loan, given to the householder directly.

Subsequent repairs of the module will be undertaken by the householder either, earlier or within cycles of three years. Officers of the Department of Tourism will inspect the premise atleast once a year and within the first four months of the calendar year, and advise on the maintenance repairs.

A register shall be kept in the module area in which the visitor would be free to record his impressions of stay as well as provide suggestions. Each house holder shall also keep literature essential for tourists which shall be copies of the approved rate lists for room and food, trekking maps, essential phone No. in the Department of Tourism and emergency services, copies of schedules of local transport services, air flights, and train services from the terminals. One member in the family will also be knowledgeable as a guide, and if he works as a guide for trekking, his rates of services should also be made known.

It is estimated that the total expenditure involved in granting such modules with all its facilities at current rate in Ladakh region will not exceed Rs.55,000/- per module, in Kashmir Valley it will be about Rs.85,000/- and Rs.65000/- in Jammu area. In all the three references the cost of the solar power unit, is excluded.

The Department of Tourism will maintain computerised registers in all their centres and reception counters, which will contain the list of such registered persons who will be offering their rooms for tourist stay.

A computer software should be prepared which will contain all relevant information regarding the arrival and departure of tourists and their registrations as per law. As the Consultants are also seeking compulsory telephone connections as facility to the tourists in his module, the local hosts will use the same facility to inform the nearest tourist centre and its computer facility regarding availability of beds in his module facility.

House Boats

Originally the house boats were meant to be parked on the banks of the river Jhelum in a stretch between Sangam and Zero Bridge in Srinagar. The Dal lake was clear off parked house boats and permission to move on these lakes water was regulated by a system which controlled the traffic on the lake. In 1954, because of political pressure by vested interest, house boats owners were permitted to

anchor their vessels in the inner waters of the lake. Within three year's time the banks of Jhelum were left bare of the house boats as of all them moved into various areas of Dal lake and the destruction of the lake started. There was no fast running water in the lake to oxidise the effluent discharged from respective house boats. New anchorage were created by dumping soil into the lake to create approach roads. 40 years of construction activity has led to a shrinkage in the lake area. The Save the Dal campaign lake does not reach the house boats owners and it is the concern of some NGO's and the Department of Lakes and Inland Waterways, who follow their own peculiar agendas.

Dry Dock Facilities

The house boat unit are represented by an owners association. There are about 1800 house boats owners offering about 6600 beds for occupancy by tourists. The association have two main demands to the State Government namely that soft loan facilities be given to them at low rate of interest to remain in business, and secondly the State Government should create a dry dock facility for undertaking major repairs of the house boats.

The Consultants have examined the proposal of the creation of the dry dock repairs facility for house boats. The blue print of such an establishment is ready and the location of the dry dock facility has also been earmarked. This project is currently not underway because of insufficient funds. It is not revealed how the dry dock facility will generates its own revenue when it is commissioned. The Consultants however, feel the dry dock facility should be provided.

According to estimates the cost of erection of the dry dock facility is about Rs. 31 lacs. The Consultants would like to endorse the scheme as a grant in aid to the full amount with the proviso that the construction should be done through an all India tender and a central agency should monitor this work. After it is completed the entire project may be handed over to the State Government for maintenance and operations.

The Consultants are strongly of the view that the house boat trade needs to be better disciplined. The Dal Lake should be without the house boats, and the lake should be restored to its status of 1952. In this respect the Consultants advise the State Government to develop the river banks of Jhelum between Pantha Chowk bridge and Amirakadal and create new anchor sites which will provide for collection of garbage, portals for fresh drinking water and electricity points, and the house boats be reanchored at these sites. Service charges, should also taken from the house boat operators.

For this work the Consultants anticipate the necessity of an ordinance and amendments in Municipal and environment laws. A separate expert group of environmentalists and town planners may be created to go into the details of the shifting.

The move will not have popular support, but in the interest of restoring the Lake to its original features and save it from further degradation the suggested action is essential. It also solves many other minor social and environmental problems not mentioned herein because of lack of space.

ROADS AND BRIDGES

In this respect the recommendations of the consultants are as follows :

- a. All roads for use of tourist traffic within the State, must have all standards signages approved by the Indian Road Congress and by the National Highway Code. This work should be prepared in the first five years of the Perspective Plan. Separate proposals should be created by the State PWD for their own State highways, and by the Central PWD for their own national highways.
- b. Way side amenities are totally absent in the entire State. There is not one urinal /toilet marked for any female tourists, as if women do not have bladders in them. The position is the same in Srinagar. It is exceptional that shopkeepers have their own toilet facilities. These are not marked for the tourists.
- c. Besides the lack of toilet facilities there is no declared drinking water facilities available on the highways, with the result that all must carry plastic drinking water bottles on their travels. This has led to plastic pollution in all places of tourist interest.
- d. Besides the couple of authorised petrol pumps in leh, large areas in Ladakh are poorly served by available motor fuel for the private transport system.
- e. It is not necessary to have expensive petrol pumps. The problem to provide fuel to transport can be overcome by promoting the sale of clean fuel through retail outlet attached with the 'kirana' shops on the roadside all over the States. They could be licensed to observe fire safety measures, their sale tariff may be higher than of the regular petrol pump, and their storage facilities should be limited.

- f. The availability of wayside facilities should be known as a signage on the State and national highways.
- g. The consultants would like to see the wayside facility for tourist on State and National highways be developed keeping the weather conditions and the fact that in some areas there is also water shortage.
- h. A system of maintenance of wayside units may be evolved as model designs and given to unemployed person to run. NGO's can also be encouraged.
- i. The State and national highways should be inspected by teams of experts to see that constructed roads conformed to national and international standards of road construction where roads are not upto the mark they should be brought up to standard including re-alignment of local curves, standardising the width of the road, provide shoulder protection on road edges, create central verge or level the pavements.
- j. Mobile hot mix plant along with road maintenance and repair material should be located at convenient distance for issue to the repair gangs.
- k. The consultants recommend the acceptance of the twenty years Development Plan created by the State PWD (R&B) in phases of 5,10 and 20 years, as now created for this Project. The cost of development of these roads is also indicated and is based on the calculations approved in the J&K Government for the year 2002-03.

All roads constructed in the State should have sliding safety girders now fixed as standard equipment where necessary. All roads should have stone breasting where there is probability of local landslides.

TRAFFIC

Traffic training schools should be opened for the training of new vehicle drivers in the State at Leh, Srinagar Baramula Anantnag, Jammu, Udhampur, Rajouri and Katra.

The State Transport Department should also open inspection centres and ensure that all commercial vehicle are inspected atleast once in three months for their mechanical fitness and only then they should be allowed to move on roads.

There should be Statewide use of traffic signals using solar power. Maintenance should be given as contract to agencies, which are capable, or doing so. In Srinagar we found certain traffic signal posts which were out of Commission for long period.

The State Department of Town Planning should have a separate division dealing with traffic research, planning and designing, survey research, planning, etc., designing & surveying road and intersections. In coordination with the State traffic police proper and safe intersection traffic and designs should be taken up.

The emphasis is to create proper environment for the safety of pedestrian tourists; the mobile tourist who is either using his transport, or hired transport should not feel threaten by the present conditions of roads which he sees. Survey taken of both foreign and domestic tourist indicates that they feel the State has not done enough to develop its road network, and where it is existing, it is not maintained well.

PUBLIC TRANSPORT

State Transport Board

In the absence of any organised system which could function professionally, the consultants recommend, first, the creation of a State Transport Board which would comprise of members of various technical services related to the running and supervision of the transport fleet of the State member representing association of road users in the State and officers of the Transport Deptt. The Board shall create its own methodology of functions, and shall have the Managing Director of the JKSRTC as Secretary to the Board.

The Board shall hold regular meetings after the agenda is circulated to its members. It will decide on the sale and purchase policy of vehicles and materials of the JKSRTC. The Board will also lay out the fleet policy and guide the Corporation on issues of personnel management, seek accountability, fleet inspections, and advise the State Government on inter State agreements, and disputes.

At this stage, the consultants do not wish to add further and allow the State to intervene to develop this concept. For role models, the consultants could however recommend the functioning of the State Transport Boards of Maharashtra, Andhra Pradesh, and Delhi State for examination.

State Transport Council

The consultants also would like to recommend the institution of the State Transport Advisory Council. This Council will have members who are ex-officio office bearers of all services and trade, supporting the tourist industry.

The consultants recommend that minimum representation must come atleast from the motor trader associations, representations from the oil PSUs, the truck unions, taxi unions of Ladakh and Jammu and Kashmir respectively, hotels and restaurants associations of the Jammu & Kashmir and Ladakh respectively, a representation of the private transport owners association or federation as the case may be for J&K and Ladakh respectively, the Transport Licensing Authority, Director General of Tourism, IG Traffic, AIG Railways, representation from Travel and Tour Operators Association of Jammu, Ladakh and Kashmir respectively, representation from the Vaishnov Devi Management Committee, Commissioner, Jammu Division, Commissioner, Kashmir Division, DDO Ladakh and Secretary, Department of Transport.

The Chairman of this Council would be the Minister for Tourism, and the Secretary of the Council would be the Secretary (Transport). The Council will meet atleast twice each year with an agenda and every quarter of the year there will be a meeting of the Action Taken Report group comprising of eleven members from the Council. The ATR proceedings of these meetings will be also known to the media within the State through press releases, so that there is a monitoring by members of the public.

The Council will also have a Grievances Redressal Cell, which should welcome suggestions and complaint from tourists visiting the State, and using the road transport network.

Public Transport

The Consultants feel that there is an acute necessity of official intervention to create superior transport facilities connecting the various tourist centres in the division of Kashmir, Ladakh and Jammu. This superior transport facility would conform to international standards which will include, providing of air conditioned and dust free buses service with built in toilet facilities, wireless set

installed on own line communication with control rooms, reclining seats with heavy cushions, large windows with manually operated screens, store for drinking water and snacks, separating partition between the driver's cabin and the seating area, separate seat for guide with a mini public address system, night light facility and adequate luggage store space.

The JKSRTC in consultation with reputed bus body builders should evolve designs suitable for short length, medium length and long length bus chassis which would be respectively suitable in different types of terrain travelled by tourists. The bus designs conforming to international standards are now available for tourists buses and these bus bodies are being manufactured in the country.

The consultants recommend that the JKSRTC, Director General of Tourism and the J&K Traffic Police together develop a Code of Conduct for the taxi drivers who are issued permits to ply their vehicles in the State. Strict inspection of vehicles and enforcement of road discipline needs to be enforced. The necessary number of persons for the enforcement of road rules needs to be examined and sanctioned.

The consultants have particularly identified the need to develop the tariff for the respective means of transport including cab drivers. The tariff should be enforceable in periods of six months in the financial year and should be of two types namely, calculated by digital meters for travel and secondly by a minimum block of time operations plus additional kms run.

There is a strong requirement to sensitise drivers, conductor, assistant drivers of all public transport on aspects of courtesy, knowledge on local tourists information, essential first aid intervention, mechanical repairs and on importance of showcasing Indian hospitality.

The consultants recommend severe punishments under relevant rules for future violation of conditions kept in the issue of vehicle permit as well in matters dealing with tourists. Vehicle should be put off road and sealed at the nearest identified police station so that they are not used by their owners and operators for specified period and this period should not be token, but punitive.

The consultants recommend that cabs for foreign tourists should be air-conditioned. Those dealing with trekkers should also have vehicles with four-wheel drive.

For domestic tourist as well as foreign tourists the Consultants advise the cabs to be equipped with WL sets for being linked with their control rooms of owners as well as the traffic police. They

should also have such facilities, which can help them, as operators to overcome any problems of geography or mechanical failures.

Detailed road maps using the GPS system should be created and put on sale as priced documents for the tourist.

The Consultants recommend the commissioning of a cartographic project to create city maps of Srinagar, Anantnag, Gulmarg, Pahalgam, Leh, Jammu, and Katra on the pattern as created by the Eicher maps for Delhi/New Delhi. These maps would also be priced publications.

The Government of India has already sanctioned special funds in the year 2002 for the development of road links as an alternate to the existing National Highway 1A. This is a road being developed from Batote to Doda to Dacksan and Anantnag. The road passes through Simpthan Pass which remains snow-bound for at least one month each year. The Consultants have visited the area and recommend that once the road is commissioned which is expected to be by the end of 2003, a fresh survey should be initiated to make this road an all-weather road and have a tunnel at Simpthan Pass of length 2.50 kms. which emerges at Simpthan village on the Doda site which will make this Highway accessible round the year. The Consultants estimate the cost of tunnel to be Rs.60 crores. It can be undertaken by any reputed Indian company having undertaken similar work. The work of developing the approach road has already been completed and, therefore, the cost of the project is less as contemplated.

Inland Waterways

The Inland Water and Lake Authority has benefited from large amount of investment in schemes which the Consultants find have been questionable investments. The Consultants view is that the direction of work undertaken by this Authority was rather inappropriate and it has become often referred scandal of the local administration.

A survey was undertaken about three decades ago to evaluate if river Jhelum could be utilized for transporting of goods as an alternate means of transport to reach various isolated population pockets. The survey had given promising indicators and suggested waterways from Anantnag downstream on Jhelum upto Wuler Lake. The proposals were left unattended.

EXCISE POLICY

The Consultants are of the view that the State should protect those traders who are currently providing customer service in the sale of liquor at the individual level.

The Consultants are of the view that a low license fee be charged from the hospitality industry for keeping liquor supplies. The same should be for hotels and restaurants catering to tourists.

When social and political conditions are favourable, the State Government should encourage the revival of the retail sale of branded liquor in the whole of the State.

Elsewhere, the Consultants have already suggested the revival of wine manufacture, an activity which is now totally forgotten but was a reality in the Valley about 60 years ago. Fairly good quality wine was being manufactured in the Valley, employing a large number of labour and making an unique contributions to the local economy.

PARKS AND GARDENS

The department of parks and gardens have already identified potential spots for the development of garden sites. These schemes have not been cleared since many years with the plea for lack of funds. There seems no good logic for the consultants to recommend new schemes when the source of funds will still be the state exchequer. This is again a case of poor planning and coordination for developing sustainable tourism. For example there is no good reason why the state government has not initiated effort to restore the residency (used as Kashmir Emporium) and develop the garden in this compound, which incidentally houses the office of Director, Parks and Gardens. If the Director's own backyard is scrub land in the heart of Srinagar town, the efforts of the consultant would have been wasted on new schemes. We therefore reiterate that the state government examines the proposal in files existing in the office of the Director Parks and Gardens. The consultants would be happy to be associated in any acceptable developmental plans in this respect.

The Consultants are now recommending the following:

- a. The School for Gardeners whose project report is available, should be immediately established. The most appropriate place to locate this school, is the Jawaharlal Nehru Botanic Gardens which provides enough untended land for training of apprentices who will be learning their trade through experiences.

In case funds do not permit to establish a regular school for gardeners then the activity may be supported by establishing a Society/NGO which will undertake to train and create job opportunities for the unemployed youth who can be helped to find out employment as gardeners in the gardens of private firms, and corporate world or in private houses located in colonies.

- b. The State Government should create a Standing Committee of Experts in Horticulture and Gardens. It should have representatives from the National Botanic Gardens Luknow, the Division of Horticulture, Chandigarh Capital Project, the Garden Supdt. Botanic Garden Ootacamaund, the representative from the Archaeological Survey of India, New Delhi, and the representative of the Horticulture Division in the Archaeological Survey of India New Delhi. Some approved consultants should in addition be kept in this Committee by the State Government.

- a. This Standing Committee will meet atleast once a year to inspect the physical conditions of the various gardens maintained by the State Government, and recommend work to the State department, following inspections.
- b. Often foreign tourists visit the Valley , who are themselves experts in the field of horticulture and gardening. They could be traced during their stay and their advise sought on specific garden improvements. They can be provided free hospitality for the small consultancies they provide, as payments to foreigners by government agencies, is a troublesome procedure.
- c. The Archaeological Survey of India, the State Department of Archaeological and the Directorate of Parks and Gardens should together organise regular inspections of archeological sites which are having parks and gardens.

- d. All parks and gardens in the Kashmir Valley should have a small entry fee. The Consultants know this proposal is not welcomed by the local people, but it is necessary to have some control on the entry of visitors. The fee should not be discriminatory to foreign visitors and the charges should be nominal. Children under 12 should be allowed free entry. Sr. citizens certified by their identity card, may also be allowed free entry.
- e. All revenue collected as entry fee should be put in a maintenance fund created in the Directorate of Parks and Gardens. This should be audited by a chartered accountant annually. 15 percent of the collections should be distributed as bonus to class III and Class IV staff which is employed in these gardens and who have worked for atleast 270 days of the financial year. The remaining money should use utilised in identified projects of maintenance in these gardens.
- f. Government must observed strict rules of public sanitation, and government order on environmental pollution should be enforced. No picnics should be allowed, or if allowed, there should be a high service charge; picnic spots should be earmarked and these activities are isolated and kept away from public gaze.
- g. Drinking water facilities should be kept free of charge in all major gardens maintained by the Directorate of Parks and Gardens. No edibles should be put on sale within 100 metres of the boundary of public gardens.
- h. Literature on the historical origin of these gardens should be available as priced documents for tourists. It is prefer that such literature is also available in Indian regional languages like Bengali, Malayalam, Tamil and Urdu besides English and Hindi.
- i. Public toilet facilities should be provided separately for man and women and signages should be normally noticeable in all Mughal and Government gardens.
- j. Vacancies in the category of gardeners in all Government gardens should be filled up by an open selection in which aptitude tests on languages of Urdu and English (Metric level), general knowledge, and agricultural skills be taken. Selection criteria will provide a 15 percent favorable handicap in marks to wards of gardener who rendered service in govt. gardens beyond 25 years period.

INTERNATIONAL BUREAUS

The following are recommended.

The State Tourist Regulatory Board should appoint at least six IATA registered travel agencies headquartered in India as authorized travel agents to book groups or individual tourists to visit the State. The Board shall also get orientation courses organized at its cost and invite selected travel agents to attend courses which will brief them on how they should advise travellers to move or plan their tours of the State.

Each year the State Government should invite in turn from various identified countries, travel agents and tour operators to visit Kashmir at State expense to familiarize themselves with the available facilities and impress upon their clients to visit this region. The State shall also supply abundant tourist material so that the visitor does not have to depend on a day to day basis to manage his travel.

On the basis of the trends seen in the past 20 years of visitors coming to J&K from foreign countries, it is felt, the State Government should select on priority foreign travel agents from the following countries to be associated in the promotional drive to attract visitors of various nationality into this region. The countries identified are – England, France, Germany, Switzerland, Austria, Italy, Israel, Iran Kazakhstan, Uzbekistan, Mongolia, South Korea, China, Taiwan, Singapore, Malaysia, New Zealand, USA, Fiji Islands, West Indies, Russia and South Africa.

The beginning in this respect should be made by opening the first designated centres to be called JK World Tourism Bureaus in Israel, Iran, Italy Austria, Germany, South Korea, Tiwan and England. The recommendation is made on the basis of the past bulk of tourists visiting J&K. Most of the visitors coming for the first time, indicated they would return to the region.

Business interest needs to be retained by providing the foreign tour operators, free flight tickets and hospitality in India for the agent and his wife for the visit to the State.

These organized tours through the J&K World Tourism Bureau will be mainly group tourists and they should be provided special status by the State tourist industry whenever such groups are moving in the State.

To develop proper coordination in the international tourist for a, the State Government is recommended to encourage specific trade bodies in business within the State to become members of reputed international organizations of travel and tours. Wherever information is known of the holding

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of travel fairs particularly in European and Middle-East countries, the State Board should consider to provide subsidized travel to a certain number of local travel agents identified by a lottery.

The J&K World Tourism Bureaus should also be encouraged to organize local publicity. They should be supplied tourism promotion kits consisting of TV advertisements video material, newspaper advertisement kits, pamphlets and posters for displays in schools, local commercial events. Periodically from a central source preferably a reputed advertising company based in India, travel advisories be issued to counter any negative publicity generated by local governments against persons visiting India.

In this respect an aggressive campaign now needs to be organized worldwide.

The State Governments in India are well within their rights as part of developing bilateral commercial activities with other counterpart provinces of friendly nations to organize positive publicity for their specific interests.

The J&K World Tourism Bureaus should also be the initiator of the sister city concept. The towns of Leh and Srinagar, to begin with, can be identified in such a scheme in which the official tourist agencies of these two towns be permitted to develop direct contact with towns and cities outside the country which are undertaking similar tourist activities.

For example, the Municipality of Leh can be encouraged to select towns in Switzerland, Austria and Italy which may be having similar tourist interest in mountaineering. Likewise, the Srinagar municipality can also have similar contact with some of the mountain resorts located in USA and Japan.

ENTERTAINMENT

The Consultants now propose the following schemes for opening up avenues for entertainment for visiting tourists in the State of J&K :-

For the domestic tourists in particular, the Consultants recommend to the State to encourage the construction of new cinema halls in areas which do not have any cinema halls. Further, cinema halls which have not been running because of unsettled social conditions in the past, need to be reopened in businesses at the earliest. The Consultants would like to suggest the State government in this respect :

- (a) To encourage the construction of cinema halls and to establish the trade, all new cinema halls opened should be given a tax holiday for two years. No entertainment tax will be levied on the gate receipt and the cinema exhibitor will be allowed to charge tickets to his patrons as he feels is best in the market conditions. At the conclusion of the two years' tax holiday, the cinema exhibitors will be charged a flat rate of 20% entertainment tax.
- (b) The entertainment tax on cinema tickets should be 20% of the ticket tariff for a ceiling of tickets of upto Rs.35/- and 35% of the ticket tariff for entry rates above Rs.35/-.
- (c) In Ladakh, a flat rate of 10% on all tickets issued in cinema halls be considered to offset the higher cost of running the establishment.
- (d) Building tax on the cinema halls in the State should be based on the number of months the cinema exhibitor operates the establishment. In this respect it would mean that in Ladakh the house tax would be normally charged for 9 or 10 months. The cinema exhibitor should be free to select the energy source to run his establishment. He will be charged commercial rates for power in case the establishment is drawing power from the local grid and need not pay any penalty cess if he is running his own captive generating plant. No relaxation in safety provisions of the law will be granted.
- (e) The State may encourage on priority the construction of cinema hall designed for maximum 400 seats. The rules of Cinematograph Act may be amended by ordinance to allow the small cinema halls to be kept within newly developed commercial complex as one unit.
- (f) Where existing cinema halls are to be revived, the State Government should provide soft loans on attractive rate of interests to the cinema exhibitor to restart his business by renovating the establishment as he desires. To re-pay the soft loans, a tax holiday of one year should be provided to such exhibitors. Thereafter the exhibitors shall come under the normal rules as laid out by the Department of Excise and Taxation or the competent authority.

The State Government may consider providing additional funds to the Deptt. of Culture as well as the Department of Information to invite artistes in groups or as single to tour the towns in the State as per decided plan and give public performances.

Because of non-availability of public auditoriums, the State Government is suggested to select in each town having a high school with a built auditorium, to renovate this auditorium in such a manner as to provide normal facilities for public performances. These halls will be used after school hours for holding cultural shows in which the local public would be attending. In this manner the cost of constructing and maintaining public halls is eliminated.

Existing schemes prepared for the revival of old projects by the Deptt. of Tourism may be given priority as their ground work has already been completed. These schemes should be directed to be completed in the first 5 years of the perspective planning.

A sum of Rs.500 crores as grant-in-aid from the Centre be earmarked which will provide funds for building the infrastructure desired under the scheme plan. The recurring cost will be born by the State Government drawn from the generation of revenue or from the State's own budgeted funds.

There are registered clubs located in other parts of the country like Roshanara Club Ltd, National Sports Club of India, etc.

The Consultants would like to suggest that representatives of the State Department of Tourism may sound the management of the various reputed clubs working in other parts of the country to consider opening their state centres either singularly or in partnership with other agencies undertaking similar work and open new business to run club houses for their members and other clients who may register as temporary members. The State Government may like to create a scheme to offer plots of land for opening such clubs around Wuler Lake. It is anticipated that if such a scheme becomes worthwhile, high value domestic tourists may move in larger numbers in the State and they can be also easily contacted through the club branches.

The Consultants recommend the development of cultural complexes to be located in towns like Leh, Kargil, Baramula, Sopore, Anantnag, Pahalgam, Shopian, Magam, Gulmarg and Budgam.

The cultural centres will be essentially public auditoriums which will provide for a dramatic stage, provisions to install a pair of cinema projectors (these will be mobile units), green room facilities, toilets for performers, captive generating plants to run a full fledged production. This is likely to be a 65 KV Gen. Set. A central heating system using furnace oils to be operated when necessary, parking for VIPs and general public and control panels for stage lighting and PA system.

The seating arrangements in these halls would be folding wooden chairs fixed on cast iron frames which do not require any maintenance. The seating capacity in these cultural complexes would be average 600 except at Anantnag where it should be approximately 750 and in Srinagar where it should have 900 seats. For Srinagar and Anantnag, the Consultants would recommend following the formula originally subscribed for developing Ravindra Bhawans in each State some four decades ago.

The cultural complexes will be opened to use by local talents to hold shows of their liking and by the State departments to hold meetings, conventions and seminars and use the premises for multifarious activities. These centres should also be opened at cost to social and political parties to hold their meetings in off-seasons so that there is better use of the premises.

The State Government in collaboration with Directorate of Film Festivals should have a future plan to hold regular mini festivals of panorama films using the film prints from the archives of the Directorate. These film shows should be held in public premises in the three regions of the State.

The State Government in collaboration with the Directorate of Film Festivals, the National Film Archives, or the Federation of Film Societies of India, New Delhi, consider holding thematic international film festivals during the tourist season. In this respect the State Government may also separately consider offering the main auditorium of the SK International Convention Centre for an annual international film festival. This international festival will be considered in addition to those being held in Delhi, Kolkata, Mumbai and Thiruvananthapuram. The cost of holding such a festival at current rates is about Rs.6.60 crores which includes the cost of travel of international film stars, foreign delegates and invited Indian delegates and movie personalities. Film festivals are considered major tourist events and the State of J&K has not yet been considered for such purposes.

The State Department of Tourism in collaboration with the State Olympic Committee should create selling clubs to be located at Wular Lake, Dal Lake and in at least one water body in Jammu region. The selling club should have all facilities for hosting social events normally associated with the game, and sports persons. India has some selling clubs which can be models for similar activities here and the Consultants recommend the selling clubs of Nainital, Chandigarh and Kharagwasla for studies. Selling boards are being manufactured in Chandigarh and Coimbatore and there is no imported component involved in the scheme.

A REGETTA Channel should also be considered on Dal Lake in the deep waters as part of the game facilities as well as a possible tourist spectacle. We do not recommend expansion in the activities of water skiing as this is dangerous for Shikaras and the stray local swimmers who use the Lake water for practice.

The Consultants recommend to the State Government to develop a swimming complex in Jammu city and another one in Srinagar for hosting of possible national aquatics championships. These centres for swimming would otherwise train the local talents. The swimming centres should also provide for temporary membership facility to tourists to also use the pool waters.

In Leh town at least two 20 mtrs length heated pool facilities should be created in the town in two parts which should be opened for all tourists registering in various hotels for use in their leisure time particularly after sun-set. The Consultants suggest this activity in Leh because by co-incidence there are two clusters of hotels in the town and keeping a common heated water pool facility near these two clusters would enhance the available entertainment facilities for the tourists. Department of Sports could also be a partner in the maintenance of these pools if the State Government so desired. The local Defence and Paramilitary establishments could be institutional paid members which will support financially the running of such establishments in town.

At Kargil, a local college has created a swimming pool stadium on the river. This fact should be brought into notice in tourist literature and the State Government should upgrade the existing facilities by installing night lights and some additional safety systems.

It may sound odd but surveys on tourists conducted by the Consultants indicate that there is an entertainment demand by them that the State and civic bodies should provide proper and effective street lighting in urban areas. Since street lighting has remained a problem in Ladakh and Kashmir regions, the Consultants recommend that specific grant-in-aid be provided to identified municipalities to install street lights using halogen lamps and separate power generating units be installed to provide electricity to run these street light systems. The street lights where so installed would be run between sun-set and midnight and the cost is to be shared by the local municipalities with the shopkeepers and the local residents while the State should also give an annual subsidy for the maintenance of the gen. Sets. Leisure walking is an entertainment in itself by tourists when they are absorbed the delight of the natural beauty of the local areas. Evening walking would extend the entertainment void of the visiting tourists to the local area.

The Consultants feel that all urban centres which are having notified area committees and municipal committees should be part of the street electrification scheme. These schemes may be funded through grants-in-aid under the head of Tourism at the launch stage in each case in the next 10 years of perspective planning.

In the first 5 years of perspective planning, a sum of Rs.800 crores is proposed for providing street lighting facilities to identified schemes. The specific cost of installation will greatly vary in the local conditions because of differences in local ground conditions.

The Consultants provide urgent priority to regenerate the street light system in Leh township which position came for very severe criticism by foreign tourists visiting Leh and its adjoining areas, during the surveys undertaken by the Consultants.

The Consultants recommend the Department of Tourism to have a census of local talents and organize schemes for them to be presented either through publicly announced competitions or through cultural festivals to be organized during the tourist season. The talented youth should be sent on tours first within the State and thereafter selectively to other towns in North India.

The State Government should consider establishing a Theatre Academy for the training of talented students in dramatics. The contribution of Kashmiris in Indian cinema and theatre far exceeds their small population and therefore this special creative energy identified in the community of the State be further channeled.

Selectively hotels in Jammu Kashmir located in major towns be encouraged to organize in-house entertainment for their clients. This entertainment will be located in their restaurants and programmes be so planned that the in-house plans get exposed to both Kashmiri cultural streams as well as Indian streams of music and dance during their brief stays. Artistes which are invited by a particular hotel may be in turn shifted to hotels of other regions by mutual consent amongst the hoteliers so that the individual cost of performance and hospitality would come down.

The State Department of Culture should organize, in collaboration with the Department of Culture of other State Governments, an exchange programme of artistes each year in which one troupe from J&K State may move all over the country through a pre-determined plan to perform in their state capitals items of cultural interests and in turn receive in the State of J&K similar State artistes who

should be put through a circuit in Jammu, Kashmir and Ladakh regions to perform at pre-determined places which will have public access. This will increase inter-state cultural exchange. Such cultural troop should also be earmarked for visiting the establishments of Defense and Paramilitary forces to entertain the troops where normal entertainment is not possible. All such visiting groups should be covered by group insurance and protected against accidents and unnatural deaths.

The Indian Council for Cultural Relations, New Delhi should be reached and invited to send their visiting cultural troupe to perform on the stage of the International Convention Centre during the tourist season. Srinagar is presently out of circuit of such visits.

During the tourist season, Srinagar used to be the centre to host a major exhibition in its famous exhibition grounds. It is now recommended that the original exhibition grounds in the town should be restored to their original shape by removing all the encroachments, The ground should be re-laid, new lighting arrangements installed and progressively the culture of organizing the exhibitions and musical events resumed here. Since this is now a major project, proper inter-departmental planning would be necessary.

The historic J&K Handicrafts Emporium housed in the original Residency building needs to be restored as a Heritage site. The Residency building was destroyed by fire due to sabotage and this building needs to be reconstructed on the basis of available design material and the official State Emporium which used to exhibit as well as sell the famed handicrafts of the State be reopened. The Garden around this burnt out building should be taken up for restoration in the first instance.

The State Government should create a list of shops maintained by private persons in the region and put it for circulation for access to visiting tourists. This list will be of such traders whose products are found to be of good quality. Those who are listed in such a created document will be allowed to put a signage on their shop with the word 'Q'. The tourists will through such signage be assured that the prices fixed on the product are fair, the shop does not indulge in mal-practices and the products are not counterfeit but genuine as well as local to the area where the shop is located. The quality marked shops should also receive official approval and publicity and the State Government may fix certain criterions of inspections to ensure that these certified premises of handicraft display and sale create a sense of goodwill and economic opportunities for the traders and their clients. The creation of such handicraft shops will thus involve no public investment.

The State of J&K has a large number of hot spring, some of them are located in very convenient areas and some are in less accessible areas. The State Government has a list of such hot spring which are being accessed by the local people and those which are lying unattended.

The Consultants now suggest that the Department of Tourism with the cooperation of the Department of Archaeology, Town and Country Planning and the Department of Geology, University of Kashmir create inspecting tours and bring on map all such hot springs and make them available to visiting tourists as bathing spas. The waters of the springs should be collected properly, channeled and a health complex be located. The special quality of waters needs to be emphasized and all these activities should be clubbed under a new nature-care facility for foreign and domestic tourists. The local tour operators and hoteliers may be encouraged organizing the tours for visiting these health spas or bathing and leisure.

Jammu region has a tradition of using Ayurvedic system of medicines while Kashmir Valley has a Unani system of medicines and Ladakh has a Tibetan medicinal system. The State Government is advised to consider establishing a working group of medical experts drawn from the three non-allopathic systems of medical science and create a scheme to offer the medical streams of Tibetan, Ayurvedic and Unani systems for the tourists to avail. Specific centres be opened which will be run by the identified experts in these non-conventional systems of medicines and indoor facilities be created for the stay and such persons who are admitted as patients seeking relief through these medical sciences.

CIVIC AMENITIES

The domestic and foreign tourists who visit the State of J&K have one more common complaint which is the sanitary conditions of public places. Municipal responsibility is seen in great dismount both in the streets and lanes of all urban areas but the same situation is more or less found also at sites of tourist visits.

The complaint of tourists can be summarized in general terms as under :-

- (a) Poor sweeping of streets daily, blocked drains, unattended plastic wastes, broken pavements, non-existing street lights, absence of guiding signage, absence of sewer treatment facilities, absence of public toilets and absence of the habit of bathing amongst the local population. The last complaint is essentially coming from the foreign tourists.

The problem of repairing civic amenities or installing new facilities is very big. The disappointing feature is that these matters are in the realm of municipal services and the municipalities are not sensitive enough to undertake activities which are important on existing conditions.

The entire State needs to have a separate plan to clean up the rivers and the streams that flow into the main river systems in the State. Such a project like the Ganga Action Plan or the Yamuna Action Plan needs to be conceived and implemented by agreement between the States and outside the State management groups and perhaps even with an international intervention.

The Consultants feel this is a matter of high importance and should be referred to another identified set of experts to create a Jhelum Action Plan which figuratively speaking should also accept the responsibility to keep river Indus and Tawi save environmentally.

HERITAGE SITES

The State of J&K is full of history. Under the Antiques Act, any article more than 75 years in age is to be declared heritage property. There is not much that can be termed as new particularly in the Valley. Therefore, a very large number of historical buildings should be covered by the various legislation which protects them as heritage property. Not only buildings but even Chinar trees and Deodar trees in the State are very old and may be as old as 400 years in age in the case of Chinar trees.

Some fewer efforts have been undertaken in Srinagar town to identify heritage sites. Placards have been put to announce the age of the building. The effort is insufficient.

The Consultants would like to suggest as under :-

In consultation with INTACH, the National Museum, the Department of Archaeology, Govt. of India, the Indian Historical Society, New Delhi, the State Government should establish an autonomous organization which may be named as The State Heritage Society which should be 100 percent funded by the State Government and be opened to receive aid from outside the State. The objective of this autonomous organization would be to create a map of historical sites of buildings which are over 75 years old using the records of ownership of such buildings as well as records available in the offices of municipality and revenue offices.

Where the buildings are in use, the owner would need to be educated in the proper maintenance of these buildings. The front facades need to be restored at the expense of the competent authority. The historical needs of each of such buildings be maintained centrally and accompanied by a photo

record on the architecture and construction. Where the buildings are in congested area, heavy vehicular traffic needs to be moved out. Portions of the historical buildings be opened to tourist visits in identified cases where such building sites are of exceptional importance.

The heritage sites should also find special mention in tourist records.

The historical sites should also find mention in the illustration and mention in the local ethnological museum suggested to be established elsewhere in this Report.

The organization will also maintain a record of the old trees and other public structures like bridges and artifacts which may not be covered by laws protecting archaeological sites. The organization will also be provided with powers to monitor the construction of new buildings to ensure that the old buildings are not affected by the new changing sky lines. The autonomous body will also guide and advise owners of such heritage property in the proper maintenance and later repairs of these properties. They cannot be sold without clearance from the State Government.

The Consultants wish to advise the State Government to consider creating an Urban Art Commission of the State. This Commission will work to control the design of new buildings contemplated within the jurisdiction of State of J&K by private and public authorities. The Commission will create guidance of architectures to follow to ensure that the natural beauty which is the asset of the State are not eroded by crushed commercial building activities. The Commission will try to enforce some elements of architecture to be incorporated in new constructions which are inspired from Buddhists and Islamic architectural traditions and where possible other sub-cultural streams. The Commission will also attempt to modify existing recent constructions undertaken within the State and particularly in and around Srinagar to make them conform to the general environment.

The Commission shall be given power to reject any design not keeping in conformity with the guidelines issued by all Defence and public buildings as well as private constructions developed on ground exceeding 125 Sq.Mtrs. shall be given a 'No Objection Certificate' on blue prints which need to be compulsorily submitted to such a Commission for developing new constructions or expanding to an old construction.

In this respect the Consultants advise the State Government to undertake an examination of the procedures governing the working of the Urban Art Commission in New Delhi.

RELIGIOUS TOURISM

The State of Jammu & Kashmir has been seat of reference to all the major religions of the world.

After the decline of Vedic culture personified in the Gandharva School of Thought and the Rigved, this region accepted Buddhism. Buddhist missionaries from this region moved into Tibet, China ending up in Mongolia and Japan carrying the message of peace and social well-being.

The decay of Buddhism brought the Vaishnav thought through Shankracharya and the population accepted the Hindu way of living. When Islam came, it was originally accepted for its refined thoughts before Islam acquired a vicious reputation.

In the 19th Century, Christian missionaries stepped into this area and came up with a theory that Jesus Christ had visited Kashmir when he was absent from his home for 12 years. Christians also attempted to convert the local population.

Minor religions like Sikhism also flourished because of its proximity to Punjab and at least two Sikh gurus influenced the local population.

The end result has been that the region is resplended with a vast number of spots venerated by various religion followers. The Kashmiri pandits who are followers of Lord Shiva have their own venerated places of worship but two holy spots held great precedence for the ordinary religious tourists for this region. A vast number of Hindu Punjabis flocks to the Vaishano Devi Temple situated above a small town Katra during the year. The same believers again in the Monsoon time undertake journeys on foot to the Amarnath Caves.

The flow of travelers to these two spots is so overwhelming that it has created serious problems of population management. The table below will give the idea of the increase in traffic to the Vaishano Devi shrine and the Amarnath Cave despite the fact that the region suffered from serious law & order problems and militancy.

Year	Total No. of Yatris to Amarnath Cave	Total No. of Yatris to Vaishn Devi
1989	95238	2312001
1990	4824	2169202
1991	15599	3151310
1992	54638	3527289
1993	56000	3368735
1994	37000	3705945
1995	60000	4032127
1996	120000	4335532
1997	79035	4434233
1998	149920	4622097
1999	114366	4668340
2000	173334	5109575
2001	119037	5056919

The Jammu region also has other venerated spots where the same Shakti cult is worshipped. Similarly in Ladakh region there are venerated spots of great antiquity related to the Buddhist religion, but it is in the Kashmir Valley where an abundance of holy sites are existing and which should now catch the attention of the State Government.

Three sites in particular, namely, the Kheer Bhawani Temple at Tula-Mula, Charaar-e-Shareef at Yusmarg and Baba Reshi Shrine below Gulmarg, should hold our urgent attention. The total list of shrines for the devout of various religions is available with the Deptt. of Archaeology, and of Culture and repetition here is not necessary. What is important is to emphasize that religious tourists hold a vast potential of exploitation by the State Government and it has not yet undertaken this work.

Following the movement of Kashmiri Pandits out of the Valley into other parts of the country due to militancy, nearly 300,000 Kashmiri Pandits are no more living in the Valley and are unlikely to return in very large numbers. They would still consider undertaking annual pilgrimage to their holy sites and a visit to Kheer Bhawani Temple would be central to their pilgrims.

We recommend that the Department of Tourism should now formulate a proper plan to organize the Kheer Bhawani pilgrimage by opening reception centres in Mumbai, Delhi, Chandigarh and Amritsar and create facilities to the visitors to come to the Shrine at the appointed period of the calendar year. The offices of the State Government of J&K, if they are located in the above mentioned cities, should undertake adequate publicity marking the special occasions of pilgrimage and open counters to coordinate the journey plans of individual families.

The Shia shrine of Charaar-e-Shareef, following the incident of its burning down, has caught the fancy of even the non-believers and the newly constructed shrine should now be developed as a religious tourist spot for Shia believers as well as the non-Muslim Indian tourists. The vicinity of the Shrine requires to be properly developed, designed, new gardens laid out and the approach road to the Shrine required to be widened and upgraded as suitable to international standards of road construction.

The State Government is therefore advised to undertake a survey of the common area of Yusmarg including the Charaar-e-Shareef shrine site, and create a developmental plan to attract tourists and trades which provides support services to tourism in this area. This should be undertaken by a team of experts of various denominations in the industry and their plans should be submitted to the Ministry of Tourism. The State should also indicate the share of expenditure it proposes to earmark for developmental activities.

There is a great need felt to develop literature related to the significance of the individual religious sites located in the State of J&K. Individual efforts in the past may help in making available the basic information on most of these places but today a more systematic approach is necessary to elect and collect all available data into separate pamphlets which should provide information on the availability of other support services, information on weather and climate, places of stay available and how to approach the individual places. To make the project self-sufficient, professional advertisers should also be associated in the designing of these pamphlets and local businesses be asked to contribute their share in the printing cost. Some of these pamphlets can be sponsored by better known business houses working in the region.

In spite of all such considerations, we have our serious fears that for future also the problem of increasing number of the worshipers calling on the Vaishno Devi shrine and the trekking to Amarnath Cave will pose serious problems of passenger safety, environment degradation and logistics.

Already 5 million people are visiting Vaishno Devi per year. The number will increase to 6 million minimum by 2007 & 7 million by 2012. The area may not bear this load of human population.

It may not be a popular decision, but the consultants recommend that the State Government should now seriously consider regulating the pilgrim traffic to the Vaishno Devi shrine at an upper limit of 6 million persons per year and a system of registration of pilgrims should now be considered to phase out the sudden rush witnessed periodically. The consultants foresee, in future, the occurrence of a human tragedy possibly due to a stampede in the general area. Presently it is possible to avoid such an incident.

We also recommend that an expert group be identified using all India talent to first survey the area for possible diversion of vehicular traffic and worshipers so that there is no severe pressure on the main road to Katra from Jammu. Once Katra is linked by the railway line one foresees a decline in the vehicular traffic moving on the existing roads but the convenience of rail journey may add to the problem of more visitors to the Shrine area.

The debate should also now be started to examine particularly the problem of environmental degradation, public sanitation and rampant construction activities in the Vaishno Devi-Katra Command area. The task is vast and complex and beyond the capacity of this project.

It is now recommended that in the first 5 years of perspective planning, an expert group should be constituted and various studies initiated so that options for future work can be identified. Again, acceptable restrictions on the increasing number of religious tourists to Vaishno Devi should be imposed in consultation with the Vaishno Devi Board and other concerned agencies.

The threat of militancy has already created its own problem for the people who wish to reach Amarnath Cave. The area has been kept out of bound for 10 months of the year. With the result that in the months of July and August alone there is a heavy rush of pilgrims to these places. The ecology of the area is very delicate and creates its own problems. The most pressing problems relate to providing logistic support and proper public sanitation. Because of the temporary nature of the pilgrimage each year, no permanent structure has been constructed which could be used round the year and at best camping facilities of the most rudimentary nature have been put on ground. Each year one sees improvements but perhaps the solution lies elsewhere.

The consultants are of the view that the area should be open to trekking for a period of 5 months instead of present two months and this period should be from May to September.

Elsewhere it is recommended that the completion of the Ring Road in the Valley be completed if its two missing link, one of is in this area between Baltal, Sheshnag and Pahalgam.

In the first 5 years of the perspective planning, the consultants recommend that the Pahalgam-Sheshnag section should be provided with a black topped road. The section from Sheshnag to Chandanwari should now have engineered path-ways which are leveled and provide with proper bridge facilities. Dry open latrines having removable collection tanks should be placed at convenient places to avoid pollution of the running streams. DRDO is now having bio-degradable waste degradation facility and these units should now be located at convenient places for use of the Amarnath yatris.

The last 15 kms. distance from Amarnath Cave should be declared as a protective reserve where no permanent construction activities except the concrete path, be kept. A helipad exists near the Amarnath Cave for VIP visits and we recommend that it should not be used too frequently except for evacuation of seriously ill or seriously injured persons.

The Consultants recommend that the State administration may examine if emergency shelters can be created by cutting into the way side rock surfaces and provide for wind barriers made of pre-cast concrete slabs. This area suffers from sudden blizzards. A system of cave shelters for helping small number of persons may also be considered in the higher reaches below the Amarnath cave.

The Consultants foresee the end of militancy in this region resulting in relaxing of the restrictions of movements for trekkers to Amarnath Cave. It is recommended that for future, a system of registration of trekkers be evolved who would like to walk to Amarnath Cave in the odd season which excludes the months of July and August. To ensure passenger safety, the State Government should provide for inspection of the trekkers' kit and also disallow individuals to move and permit only small groups to take the journey. This would help in spacing out the sudden rush to these journeys.

The Consultants further recommend that a pilgrim tax be levied for future on all persons who are moving into the controlled areas kept for the two famous religious places. In the case of Vaishano Devi, the pilgrim tax should be levied beyond Katra once the journey is started, and at Chandanwari in the case of the Amarnath Yatra.

We do not wish to recommend charging of any similar levy at other religious sites.

Money realized from such pilgrim tax should be used in improving the micro economies of the villagers neighbouring to these sites, part of the money should be given to the village panchayats identified for such benefit and part of the money be earmarked for the maintenance of public services which aid the pilgrims to move more comfortably.

NEW DESTINATIONS

Tourist destinations in the State of J&K currently are nearly identified by their locations as they are the preferred places of visit by both foreign and domestic tourists.

In Ladakh, the destinations are Leh, the monasteries of Hemis and Lamayaru. In Jammu, the Katra-Vaishano Devi area is exclusive, while in Kashmir Valley, the focus of tourist visits remains Pahalgam, Srinagar and Gulmarg.

Tourists when they are moving in the Kashmir Valley by restricting themselves to the three mentioned areas, have created problems of congestion, environmental degradation and pollution and led to all types of corrosive effects on the system. As we are identifying an increase in the number of visitors both to the State and in the main Valley, it is necessary to contemplate the opening of new areas to ensure that tourists not only get dispersed into new areas so that they retain their unique experience of absorbing the thrills to contemplate a return to fresh areas which they missed in their original rounds. The dispersal will also help in the spread of the economic benefit to the local population which would be involved in the hospitality activities but will prevent at the same time the negative effects of concentrated apopulation in the currently popular areas.

We would like to now take up regionwise the identification of new areas for development. We have also noted that during our survey some of the now mentioned areas have already been identified by the Deptt. of Tourism in the past 10 years of planned activities of the Department and, therefore, there may be some repetition, yet our overall view will help the Ministry of Tourist in the Government of India to know of these areas which have yet to be brought on the tourist map of the region.

Ladakh

For the domestic tourist, Ladakh still remains distant a distinct land. However, efforts are being made constantly to create an awareness of this region. By a strange co-incidence, the Kargil Conflict brought into focus the entire region which resulted in a new interest by domestic tourists to visit Kargil as a former theatre of war and at the same time lay the foundation of domestic tourists into the Indus Valley.

Ladakh, upto now, has only one major town, Leh. This town however has small resident population which has been receiving domestic and foreign tourists each year in larger number making it very congested in the summer season.

Because of the temporary congestion which is a regular feature each year, it is felt that all visiting tourists need to be dispersed into multifarious activity. Again, on the Leh-Kargil section there is a growing interest amongst foreign tourists who visit the ancient monastery of Lamayaru. The interest of the foreigners for this monastery is growing because it is considered to be the oldest monastery in Ladakh. The monastery management has created a residential facility for visitors who wish to come here for long stay. Lamayaru is therefore witnessing an expansion in the urban limits of the village but without providing for ancillary services which are affecting the micro environment of this centre.

An important emerging centre in the Indus Valley is the village Khaltse which is about five hours driving from Leh on the Leh-Kargil road. This roadside village is also the midway point to Batalik on the LOC.

It is recommended that Khaltse village be developed as a model village and a tourist bungalow should be located which would provide all ingredients of passenger comforts normally associated in a motel. This complex should have a petrol pump, a restaurant, toilet facilities for highway passengers, a mini bus stand, a counter for selling of handicrafts, and efficient post office providing for international trunk dialing facilities, etc. The motel should also be well stocked with tourist literature and have a tourist guide at hand to advise the trekkers and travellers on how to move in the area and indicate the places of interest. Khaltse should be considered as the halt station to visit the Lama Yaru monastery as well as Alchi monastery. Trekking routes can be easily identified for the tourist to move into the Zaskar Valley. The Deptt. of Town and Country Planning of the State Government may be asked to develop this centre on the appropriate lines they consider best.

We recommend accelerated development of the Neyoma town as a major urban area for the dispersal of tourists out of Leh when they are visiting the region. Neyoma is considered an ideal place for planned excursion by tourists to visit to Chushul and the neighbouring areas. Further, daytime excursion can also be organized from Neyoma to go to the LOC line of the Indo-China Border at Daksham. The tourists can also undertake fishing trips and enjoyable trekking is possible with Neyoma as the base. An important place of visit for the tourists from Neyoma would be the Hanle Observatory and the hot-springs in the neighbourhood.

We recommend the development of Border Tourism involving the tourists to visit certain identified Indian posts officially escorted by local officers upto the Indo-China Border/LOC. The Chinese government across the LOC is encouraging their citizens to approach the LOC under similar provisions as tourists. In this respect we identify Daksom, Koyul, Dungti along the river Indus near Neyoma and Chuchul upto the Border Meeting Hut, as places of tourist visit for future.

In implementing this suggestion it is necessary to remove the inner line restrictions in this area. Photography may be only permitted to civilian features. With the availability of high resolution satellite surveillance facilities, prohibition on cameras by persons moving on surfaces in this region have no more relevance and is now an outdated concept. Visitors coming particularly to Chushul and to the former air-field area will hold interest as this was the seat of Indo-China Conflict in 1962. A visit to the Major Shaitan Singh Memorial should be considered a compulsory engagement for the domestic tourists. It would provide good education on how the Indian defence forces work in hostile environment.

Border Tourism in its most dramatic form is already functional on the North-South Korea border where South Korean tourists are actually allowed to move upto the border line and be photographed in the backdrop of the North Korean military barracks. Border Tourist, as envisaged, should be first limited to high value domestic tourists as the cost of travel and providing hospitality would be involving some expenses. Taxis with four-wheel drive provisions should be only allowed in these conducted tours.

It is recommended that the village of Chushul be declared as a tourist village. It should be provided with a tourist bungalow with satellite telephone service, a small oil dump to be operated by a resident of the village, a 25 KV generating set to provide for the essential electric power for day and night purposes serving both the village as well as the visitors, proper metal road in the village, a mini sewer treatment plant, a proper primary school complex, a counter for general stores which will also be the outlet for handicraft goods and dairy products, a veterinary health centre and a tourist complex providing for 12-bed facilities. It should also have sufficient raw and tinned commodities to last at least two weeks.

Since the Kargil Conflict the Leh-Manali road has become an important alternate route to reach Ladakh region from the rest of the country. The Prime Minister has already sanctioned new funds for creating a tunnel at Rohtang Pass which would improve travel conditions in the Lahaul-Spiti Valley and also extend the time for the use of the National Highway for longer periods into winter season. This route will still remain closed for at least two months in the year because there are three remaining passes to be traversed in the journey and they are often snow blocked. There is another route which is

an all-weather tracked which goes through Kardozi to Sumdo into Himachal Pradesh. Karjak is a village located near Lake Tso Moriri, the area of wildlife birds sanctuary. A metal road connects Upshi with Karjak. Therefore, the village is accessible. It is presently visited in seasons by bird catchers.

Village Kardozi has a tourist potential. It has not yet been publicized and, therefore, remains unknown.

The consultants recommendation is that the village should be planned on model village line provided with a mini sewer processing system, a tourist lodge having wireless facility and a local guide. This tourist lodge should provide for overnight stay and also be a rescue hut for drivers trapped in adverse weather. The village itself should be identified to locate module rooms as discussed elsewhere in this Report. The area has delicate environment and therefore it is necessary that persons desirous of moving to this village should be numerically spaced out and no over-crowding is allowed. At any time in the season the village should not have more than 20 outsiders. This is a very good base for trekkers who would like to walk into the nearby glaciers. Karjak should also have a police outpost which will undertake vigilance on foreigners' movement in the area. This is an inner-line area which is presently not having any police presence. The police post should also be located within the village.

The existing road should be re-aligned away from the Lake shore so that the wildlife which is unique to the place is not disturbed by human presence or mechanical sounds. Environmentalists have already submitted a proposal in this respect separately to the State Government and we endorse their request in the realignment of the existing road which goes into Himachal Pradesh area.

It is recommended to upgrade the existing tourist facilities at Lamayuru monastery. The monastery site should be provided with a petrol pump and parking facility for 20 cars and 20 HTVs/buses. A tourist motel should be established and the village should be given a mini sewer treatment plant. A 65 KV generating set in pair should be installed to provide electricity to the village as well as to the monastery and the tourist complex contemplated. As this place already attracts an abnormal number of foreign tourists, the State Government is recommended to open a police post which should have sufficient civilian police personnel and a sufficient number of staff to monitor the movement of the foreigners in this area. The tourist complex should also provide for foreign exchange facilities to prevent foreigners directly dealing in foreign exchange with the local monastery officials.

The tourist complex should also have a post office and drinking water facilities for the highway travellers who normally halt when undertaking a journey between Kargil and Leh.

It is recommended that the State Government considers developing Mulbek village as a tourist spot by locating a tourist complex catering particularly to the trekking tourists. The complex should provide for mountaineering gear for hire and tinned provisions. It should also have a dedicated wireless facility to communicate with the local police as well as the HQs of the Tourist Department. The tourist complex should have registered guides, parking facilities for cars and buses.

It is felt that the unauthorized trekking around the Maitrie Statue located near the highway be all cleared and the land acquired by the Tourist Department. This place should be redeveloped as an alpine garden.

In consultation with the PWD the national highway should be shifted at least 500 ft. from its present position to provide for clear space for redeveloping the spot as a planned garden and make it photogenic. There should be a reception centre which is designed in buddhist architecture which should also provide for all information on the historical places. There should be a panorama gallery in this reception centre which will illustrate scenes from some of the neighbouring historical sites. Parking facilities for 20 cars and 10 buses should also be developed and a restaurant should be located. Mulbek is an important Buddhist centre of archaeology and we assign a high priority for its development.

It is suggested that in case for any religious reasons there are objections, then the local monasteries controlling the Maitrie site be provided compensation and alternate accommodation for any displaced persons so affected in the development project suggested herein.

Elsewhere it has been recommended to create a single rail track for the purpose of movement of tourists connecting Mulbek with Kargil and take the rail system into the Suru Valley. The inspiration for this suggestion is drawn from similar systems which are existing in Switzerland, Alpine Italy and the Lake Districts of England. For more details, please see the sections on railways in this Report.

Kargil township has remained insignificant in its tourist potential. Its remoteness from the Valley in particular has kept away the tourists from reaching there. It is the seat of local culture and is an important town in the region. There is only one road which is connecting Kargil to Kashmir Valley and the section between Somamarg and Dras is a challenge to drivers.

Kargil town requires to be upgraded to welcome tourists in larger numbers. A sustained publicity campaign should be undertaken to re-invent this area for tourist interests as it has been done in the case of Gulmarg. The town was the focus of national attention during the Kargil Conflict and there is wide spread interest to visit the places which were in the vicinity of the Indo-Pak Conflict. The area has sufficient tourist interests for visits and require to be now developed by providing them with all weather road and accommodation facilities.

It is recommended that the Kargil-Somamarg road should be provided with sufficient funds and redeveloped as a two-lane road to allow for free flow of traffic. Parts which remains snow-bound in winters may be covered by concrete tubing to protect it from accumulated snow and unstable soil. Road bursting using spray concrete on net mesh extending upto 300 ft. on the mountainside be considered. Where possible concrete may be injected into mountain sediments to provide as stabilizers. We find that the agencies undertaking the development and maintenance of border roads in the whole State have not accepted new technology in road opening and techniques which were acceptable half-a-century ago are still being applied extensively. If there is lack of information on new developments in road building, it is necessary that the State Government consider dispatching their promising engineers to visit identified areas in North Europe and become acquainted with the latest technology in mountain road construction.

Kargil town needs to have an urban development agency of its own which should have supporting staff of architects and engineers and the State should provide authority and funds for creating a master plan to re-develop the entire urban area. New urban colonies need to be developed and some population redistribution in them to provide for an ideal township environment which will welcome the new tourist traffic contemplated.

The current tourist hotel managed by the Tourist Department requires massive upgrading and design. It has suffered extensively by insignificance because for nearly 10 years the place was not at all utilized for the design purpose. The Deptt. of Tourism should consider a new plan of redeveloping this hotel site incorporating safety systems as well as features of modern comfort. It should at least achieve a 2-star status for acceptance by the foreign tourists.

Because of the isolation of the area, the atmosphere in Ladakh is clean and without pollution. Recognizing this fact the Government of India has already constructed a world famous observatory at Henlay. For the ordinary tourist this is out of the way.

Visitors in Leh would still like to benefit marginally from the experience of visiting the Henlay Observatory if a similar facility was located around Leh. There is a hill behind Leh town which is a dry high point. It is felt that a planetarium to provide sitting capacity for 100 persons may be located here. The planetarium will feature the sky of each season and also undertake lectures to school children and for tourist interest the planetarium should also have a 6” reflector telescope for night time viewing.

Reflector telescopes are manufactured in India while the apparatus for the planetarium is freely available as an imported item.

The Planetarium should be put under the charge of the Department of Physics in the University of Kashmir. It will work with consumption with the J&K Tourism during seasons to invite visitors to its lectures. The cost of the project is to be divided into the capital cost of the construction, approach road from Leh town of approximately 6 kms. length and the cost of the equipment. The cost of the equipment for this planetarium is estimated at Rs.80 lakhs. The capital cost for construction is estimated at Rs.1.75 crores. The recurring cost would be approximately Rs.11 lakhs annually.

Kashmir Valley

Tourist traffic in Kashmir Valley is currently focussed in three areas of Gulmarg, Srinagar and Pahalgam. This has resulted in, amongst other things, heavy environmental degradation and unplanned urban development. It is necessary to develop new area of tourist interests so that the dispersal of tourist traffic is more evenly spread and all accessible areas receive their share of economic development.

The Department of Tourism in the last five years has already been active in preparing developmental plans but they have not been launched because of non-availability of funds. The Consultants have examined these projects and reiterate that the plans are well thought out and the State Government should earmark funds for their phased development. It is not enough that tourist huts are created. The development of new areas involve coordinated plans to develop all-weather roads, extend power lines, create drinking water resources and also lay out for intending tourists a plan on how to make their local stay in the new areas interesting and an investment in time.

The Consultants feel that the State Government should now shift its focus of reception of tourists entering the Valley from the existing hub of Srinagar, to Anantnag. The contemplated rail link has included Anantnag as a halt station. The major arterial roads in the Valley all converge in the town area, namely, the national highway, the alternate bypass to the national highway through Sinthin Pass, the road to Pahalgam, the highway to Shopian and an important road which goes to Kokarnag.

The Consultants strongly recommend the establishment of a new Anantnag Development Authority (ADA), its main task would be as under:-

Acquire new land on the Anantnag-Pahalgam road and develop a new township.

De-congest the old Anantnag town by acquiring existing properties and relocate the disturbed owners to plots to new Anantnag town and compensate to help construct new dwelling units.

Acquire properties in the old Anantnag town, be demolished to widen the roads and develop open spaces around well-known religious monuments and places to visits.

Restore to the original shape the old Anantnag temple and garden area by removing all new constructions. The Anantnag Development Authority (ADA) will first negotiate with the existing trust authorities to help in the restoration work and if there is resistance the State Government should consider an ordinance to take over the property and undertake all developmental work and thereafter return it to a Minority Trust which may have also members from the original Trust organization.

Develop a tourist reception complex using the blue print of the tourist centre at Srinagar.

Develop a permanent establishment for the reception of the Amarnath Yatris. This centre should be in a position to take batches of 1000 persons approximately per day and be in a position to look after the board and lodging of upto 5,000 stranded pilgrims.

The existing bus stand of Anantnag should be shifted out and relocated in the new township area.

The ADA will also create standard blue prints of dwelling units to suit various sizes of plots and offer the perspective plot holders the choice to get them. Horticulture controls will also be laid and markets will also be so designed as to draw inspiration from the local architecture.

The new Anantnag town should provide to absorb a new population of 100,000 persons. The plan of development should be as under: -

2003-2008 - The period will see the State Government create the Anantnag Development Authority by a new legislation to be passed by the State Assembly. The appointed authority will select the team of developers and planners and create a master plan. The record of land in the meantime will also be brought up-to-date and put on a computer file. Outside agencies, expert in such work will be appointed to compile all land records. The ADA will also identify supporting projects to be undertaken in the urban development work.

2008-2015 - The period should see the development of arterial roads, the detailing of sectors in the new township and the offer of plots to perspective buyers. The new township should also, during the period, see the development of a new general hospital, telegraph office, inter-city bus service and the development of a city bus service. New markets should also be opened and the sewer system laid in the new township should be energized. The existing district police lines should also be shifted to a new site and the land released in the old city area be partly converted into a park and a new police station where police officers who need not base themselves in Srinagar for overnight stay and instead be nearer to their place of different business dealings.

2015-2022 - The period should see the development of the new township and its commercial centres. The development of educational centres and the shift of population from the old city area, to some extent, to the new residential areas. It is expected that the old residential areas in Anantnag may be converted into markets. The redevelopment of the old city area would be completed.

The cost of development work in the suggested activities at old Anantnag township to be now undertaken by the proposed ADA in the 20-years perspective plan will be dependent on the rate of inflation, the socio-economic conditions prevailing in the Valley in the future in the coming years and the kind of leadership which will exist both political and technical.

The Consultants are of the view that a financial outlay should be kept for the creation of the developmental authority (ADA) and the initial work of preparing the master plan. The Consultants would advise earmarking for the period 2003-2008 a sum of Rs.1000 crores with the first year of implementing the plan to be given a provisional budget of Rs.two crores only.

The Consultants view the establishment of the proposal urban development authority (ADA) will be an engine to generate a large number of employment opportunities for both technical and non-technical personnel. It will also generate economic activities in support services which will assist in the development of the new township concept.

The consultants view the area of Aharbal as holding a high potential for future tourist interest. Aharbal is in fact seen by the Consultants as a virtual goldmines in the contemplated tourist industry in the contemplated 20-years perspective plan. Aharbal alone can not be developed. The Consultants are of the view that along with the Aharbal all the area extending upto Shopian needs to be included in the perspective plan. The famous shrine of Charaar-e-shreef also falls in the zone. Aharbal has beautiful waterfalls where new gardens can be developed but this requires again a concentrated planned activities which will involve the township of Yusmarg, Shopian, Kulgam and Aharbal.

The Consultants therefore, recommend that a new Shopian zone Development Authority be created to undertake all such future planned development of the area and special funds would need to be allocated.

NEW TOWNSHIPS

The Consultants have worked extensively in field journeys and find that there is need to decongest further the tourist traffic concentrated in Srinagar. Elsewhere we have recommended the establishment of a new township as an extension of the existing Anantnag town. We now recommend a new township to be considered as an extension of Kupwara town for which a new Urban Development Authority should be created locally for the purpose.

Kupwara is located in a neglected area of the Valley and has been ravaged by extended militant activities which has stopped all developmental work. The population in the rural area has also moved out to put pressure on the urban centre. Otherwise there is a huge tourist potential for trekkers to move through Kupwara into the unexplored valleys around the area. Kupwara town requires major upgrading in its public services and infrastructure. The view of the Consultants is that it will take another 5 years to normalcy to be restored in Kupwara district and then the development work contemplated. In the mean time, by establishing an Urban Development Authority, work of survey and other activities of laying the plans can commence.

The Consultant would like to recommend the legislation to establish the Kupwara Urban Development Authority by the State Government and establish an administrative set up for the purpose. The requirement of funds for the management of the Urban Development Authority in the first 5 years would be Rs.16 crores. The Consultants feel that the work of developing the new township would involve at least an outlay of Rs.16,000 crores extended between 2008-2018.

Similarly, the township of Bandipur also requires upgrading and improving its municipal infrastructure. The city sewage needs to be replaced by a new modern and efficient system. The town roads and lanes need to be repaired and widened and the local markets need to be relocated. The Consultants recommend a master plan be created for upgrading the facilities in Bandipur town. The work may be assigned to the Town & Country Planning department of the State Government. The Consultants recommend that the upgrading plan of Bandipur town may be assigned an expenditure of Rs.30 crores in the time phase of 2008-2013 for initiating the improvements. The State Government will put its share from funds under the head of local self-government to make up for the deficit.

NEW MASTER PLAN FOR SRINAGAR

Srinagar town is amongst the most ancient towns in the region and definitely going back to the 4th Century BC. All writers in the past who have visited the town have made mention of the unsanitary conditions existing in this urban area. The local citizens endorse these observations but they have not themselves undertaken any extensive urban planning in the past.

A brave effort was made nearly three decades ago to develop a master plan for the extension of Srinagar town. The plan was reported undertaken through extensive surveys and deliberations under the guidance of the Deptt. of Town & Country Planning and a document was prepared and sent to the State Government in the early 1980s. The many recommendations of this master plan for Greater Srinagar receive its fair share of frowns and no final decision was taken on it. The master plan was meant to take care of a city population of 600,000 and had a vision for future. In the absence of non-implementation of this master plan scheme, Srinagar town has in the mean time doubled its population, expanded the urban limits into former rural areas and in the process set aside all norms of urban development. The master plan for practical purposes is a useless document. It is evident that if Srinagar town is to survive for future as a city to welcome tourists, the town would need to be redeveloped on proper lines, given new public service systems and those who are to undertake the work will have to be projected from political interference and vested interests.

The Deptt. of Town and Country Planning is considered a good enough technical agency by the Consultants to undertake a fresh exercise to develop a new scheme for a master plan of Greater Srinagar. The Consultants recommend that the exercise for developing the master plan for Greater Srinagar be taken up at the earliest under a time bound scheme. The implementation of the master plan may have to be considered as a capital project by the Government of India to be carried out by a Central agency, again under a time bound plan. The recommendation may have implications of State-

Centre relations but if Srinagar town is to have a proper future, then it may be necessary for the intervention of the Centre to save this town which its own people are unable to take care of.

For developing the master plan, the Consultants recommend for the first 5 years period an expenditure of Rs.6 crores to be used for organizing surveys and assign consultancy to expert groups to help the government department to expedite the finalizing of the draft master plan schemes. The Consultants recommend further that the Government of India should consider intervention separately outside the scheme of developing tourism in the State and consider special efforts to be earmarked for implementing the revised master plan.

It is evident that for future time to come the presence of the paramilitary forces will be a running feature. Because of present uncertain conditions, paramilitary forces are stationed all over the State occupying industrial sheds, hotel premises and State Government accommodations which were designed to serve other public purposes. The Consultants feel that the massive presence of paramilitary forces in itself is becoming counter-productive to attract outside tourists. New cantonments may be necessary to earmark for paramilitary forces in areas where their presence for future is identified. In the view of the Consultants, areas around Sonmarg, Kupwara, Baramula and foothills area of Pirpanjal Range as well as in Poonch and outside Leh, such cantonments of paramilitary forces be earmarked. Once the premises are earmarked, the paramilitary forces be asked to develop the sites for permanent habitation as well as incorporate security measures. Paramilitary forces thereafter should be asked to vacate all premises occupied by them at tourist sites. The vacated premises would need to be repaired and renovated. In some cases, these premises would require to be totally reconstructed.

The Consultants recommend to the State Government to examine the suggestion and if found acceptable to move separately with the Government of India for funds which will be paid as compensation for the land acquired by the State Government for creating the cantonments for paramilitary forces. In the current, the Consultants do not suggest any financial outlay, as the suggestion is tourist friendly but as security implications otherwise.

Srinagar is surrounded by large water bodies, parts of which are given different names. One of the most beautiful and sheltered water bodies is of the Nagin Lake. The Nagin Lake area is the favourite of the foreign tourists who make use of the houseboats anchored on the shores. The Consultants are of the view that a small boat club with evening entertainment facilities would be an appropriate addition to the celluberous environment. The Boat club shall have temporary members

who are living in the houseboats and picked for a minimum period of 15 days. The Boat club is contemplated to have a small bar and a dance floor. It should have an environmental air of the old British style. The Consultants would like to earmark an expenditure of Rs.20 lakhs for developing the boat club at Nagin.

The Tourist Reporting Centre in Srinagar is a historical building. It is also a landmark in the State as it was the culmination of rare idea to provide the best tourist facilities for the visitors when such concepts were foreign in India. Elsewhere in our proposal, the Consultants have already recommended the development of a similar tourist Reporting Centre in Anantnag. The Consultants are of the view that the existing Tourist Reporting Centre of Srinagar requires to be upgraded by undertaking repairs of the original structure as well as a review of the facilities that are existing here. The premises is showing decay and administration's neglect. The premises are not fireproof at all. The Consultants after having paid numerous visits to the Centre would like to recommend the following :-

All dead record of the Government which is filling the attic space in the building should be removed forthwith and the premises be renovated extensively. The false ceilings in the building required to be again restored to the original design.

Only such officials should be allowed to work in the Centre who have a direct dealing with the reporting tourists and whole offices alongwith their hierarchy need not be present. Each of the assigned room should have not more than two persons and proper signage in the corridors to be installed to guide the tourists to their right office.

All electrical wiring should be made fireproof and proper fire-fighting equipment be installed. The existing equipment at the time of inspection by the Consultants was found being installed in 1988 and thereafter never tested when it should have been tested annually. The Departments which are having their sale or enquiry counters on the ground floor require to be renovated and stocked with appropriate forms and literature helpful to the visitors. There should be a separate counter for the sale of trekker's map and other information. The restaurant facilities require upgrading extensively. Communication facilities now need upgrading and the equipment for use of the visitors should be installed in proper quantities.

All personnel posted in the TRC, Srinagar should be provided with a special uniform which would be suitable for winter and summer seasons. All personnel posted on the tourist counter should

be affluent in at least one foreign language and this fact should be made known through a name plate signage which state 'I speak language'.

Currently a large number of tourist huts are occupied by government officials. These officials need to be shifted in phases by providing them with alternate accommodation. After repairs, the facility should be opened to the visiting tourists as per the original scheme.

The periphery around the existing plot needs to be cleared of all encroachments, the roads need to be re-aligned and the garden inside the TRC, Srinagar be properly re-laid.

As this is the first showpiece in Srinagar town and has remained neglected for the past 12 years, the Consultants would like to recommend an outlay of Rs.4 crores for organizing the upgrading of the Centre and the work should be done within the first 5 years of the perspective plan.

The Consultants would also like to recommend a similar tourist centre on a smaller scale at Kargil and Leh. The financial outlay for Kargil and Leh is recommended to be Rs.5 crores each as they will be new activities. They need to be put on ground with proper staff and equipment to await the new flood of tourists expected as soon as the law and order situation improves.

The tourist spot of Baba Reshi is a neglected area. It has been shadowed by the location of Gulmarg which was favoured by the British tourists who began coming into the Gulmarg meadows sometimes beginning from 1920. Baba Reshi shrine is one of the most venerated spots in the Valley for the local people. Each year at auspicious days worshipers come in large numbers and congest the place.

The Consultants are of the view that Baba Reshi shrine now requires to be re-invented for the visitors. Firstly, because the original Baba Reshi was a Sufi Saint and preached the message of humanity. It is for this reason that both Hindu and non-Hindu venerate him today.

There are many current problems associated with the religious shrine. The Consultants, therefore, recommend the following :-

The road which connects the shrine with the Gulmarg road requires to be widened to allow for a double carriage. It also needs proper night illumination.

The area around the shrine requires to be redesigned to create more open spaces for the worshipers to move around and the Shrine should also be connected with a new road which may end at an agreed point in the Gulmarg meadows.

The Baba Reshi shrine should have a primary health centre, proper public drinking water facilities, accommodation for a seasonal police post and the shrine structure itself requires extensive renovation.

For the upgrading of the road connecting Baba Reshi, the Consultants would like to earmark an outlay of Rs.50 lakhs. For the upgrading of other facilities mentioned above which would include the development of park areas, electrification in the religious site and the development of other tourist facilities, the Consultants would like to earmark an outlay of Rs.70 lakhs. The Consultants further suggest that the religious shrine of Baba Reshi should be properly publicized in tourist literature for future. The sheep farm area at Dacksun which was a tourist site, requires to be taken up with a new beginning. The entire drill of developing sheep farming is to be started from scratch. This will restore the confidence of the local people, regenerate breeding of sheep for industrial use as well as be a day activity for visitors to the spot. The Consultants would like to earmark an outlay of Rs.one crore to regenerate the sheep farm at Dacksun. This amount is earmarked only for the first 5 years and further expenditure may have to be borne by the State Government from its own internal resources as the need arise.

The development of the Mughal Garden at Achabal and the development of the Mughal Garden at Verinag have been postponed for a long time. The last major renovation of the Verinag garden were undertaken sometime in 1971. Similar is the case at Achabal. The Consultants after having visited these sites, are of the view that the two Mughal Garden premises require extensive repairs and upgrading, re-laying of electric lines and nigh light facilities, repairs of channels and fountains and at Verinag, extensive renovation of the existing tourist huts. The Consultants, therefore, recommend an outlay for developing the Mughal Garden at Achabal Rs.35 lakhs, and at Verinag an outlay of Rs.55 lakhs.

Separate developmental plans would also be necessary after field surveys undertaken by the Deptt. of Town and Country Planning for Achabal and Verinar. Unplanned urban encroachments need to also be cleared.

Elsewhere we have already recommended the institution of the urban development authority at Shopian. It would include the small township of Yusmarg and Aharbal. This area requires a special attention from the tourist point of view as it has great tourist potential. The Consultants, therefore, suggest the following :-

There should be a tourist bungalow at Charaar-e-Sharif as this is a major scene of tourist attraction particularly after the shrine was burnt down and reconstructed. For this the Consultants would like to earmark a sum of Rs.20 lakhs for the development of this facility. The support services between Yusmarg and Charaar-e-Sharif are non-existence. The Consultants would recommend a sum of Rs.6 lakhs for the construction of kiosks at appropriate sites between Yusmarg and Charaar-e-Sharif.

There are two neglected valleys in Kashmir, namely, the Lolab and the Bungush Valey. The two valleys have far greater tourist opportunities than those offered in Pahalgam-Lidder Valley. Both the Valleys have their urban centres which need to be properly connected by metal roads, provided tourist stay facilities, tourist information centres and be connected by trekking path which will take the tourists into the interiors.

For the development of Bungush Valley, the Consultants would like to have an outlay of Rs.35 lakhs while for the development of the Lolab Valley the Consultants would like to have an outlay of Rs.40 lakhs. Attention to the two Valleys needs to be paid during the period 2008-2013 as these areas are presently termed as disturbed and are on road to normalcy. At the present stage the Deptt. of Town & Country Planning can be assigned the task to undertake developmental plans and submit to the Government for further approval.

Jammu is the terminal point for one of the major pilgrimages of North India. With the extension of the Kashmir railway link, some of the shrines out of Jammu town may disappear and Katra township may get its gain. The Kashmir rail link provides railway station at Katra but Jammu is too big a commercial centre to see any loss of commercial interest and the railway station complex would still remain a very important hub of travelling tourists. Unfortunately inspite of the massive passenger traffic, the Indian Railways have not provided enough facilities for the religious pilgrims and the State Government has not put its best foot forward to provide support services to its short term pilgrims visiting Vaishno Devi. The Consultants, therefore, wish to put the following proposal :-

The Ministry of Railways should provide major transit facility at Jammu railway station for the religious pilgrims destined for Katra. The State of J&K should provide separate additional transit

facilities for domestic tourists either enroute to Srinagar or to other points in Jammu region. The high value domestic tourist avoids transiting through Jammu Railway Station and prefers Jammu airport. It seems for future also he may continue to do the same but the volume of railway passengers either is very big and the Jammu railway terminal requires to be redesigned to make it more passenger friendly as well as more secure.

Rajouri & Poonch

The area of Poonch has been left untouched for a very long time from developmental activities and more in the tourist sector. The reason is essentially the fact that the town area is very close to the Line of Control. The town has a small airstrip, a golf course, parks and a small market. Poonch may not be a favoured place for the ordinary tourist who along with his family may visit the area. The Consultants are of the view that the first effort to revive an interest of domestic tourists would be to organize special tours of young people and give them a package of adventure tourism and take these groups to visit Poonch town area and spend at least two nights. Young golfers may be also suggested to join the local golfers from the Army camps and play a round of the game. To begin with, it is necessary to upgrade the municipal services presently existing in the town. The main emphasis would be, besides cleanliness, to develop the area horticulturally by not only improving the existing parks and gardens but also clean up all green areas and make them presentable. Thereafter a publicity drive should be launched using the upto date scenery and invite the more adventurous youth to pay a call to the town. The package tour may have to include an overnight stay at Rajouri where local Mughal garden exists and the Rajouri Fort also is an added attraction. The Fort is a bit out of reach and could be packaged as a trekking experience.

In Consultation with the local Army Unit and the Corp Command, one Army post in Mendhar Sector may be identified for an interaction with the visiting groups and they may be shown that how the Defence of the country is organized at the grassroots level and under what conditions the men of the Forces live and work. The re-entry of the visitors in this Sector even if it is limited will help recall that the area is civilian and open to visits. Sometimes it is necessary not to make a big splash and the Consultants feel that the time has come for the Poonch-Rajouri area of Jammu region be identified for visits by domestic tourists. The Consultants would like to, therefore, recommend a limited programme as under :-

Upgrade the facilities of the rest house at Rajouri as well as in Poonch. For this the Consultants recommend an outlay of Rs.15 lakhs for the two stations for undertaking the upgrading of physical facilities.

Horticultural development of the Mughal Garden at Rajouri should now commence and a group of gardeners be permanently stationed and provided with proper equipment and supervisory staff. A lot of repair and excavation work is necessary; therefore, the administration of Deptt. of Archaeology is recommended for the first 5 years period in the redevelopment of the garden. The Consultants would like to earmark an expenditure of Rs.80 lakhs spread over a period of five years for providing physical upgrading of the horticulture side at Rajouri.

At Poonch, the Consultants recommend an outlay of Rs.50 lakhs as share of the Centre for similar horticultural upgrading of park facilities in the town area. The State Government will also put in its agreed share of investment.

The Consultants further advise that the action to invite domestic visitors to Poonch and Rajouri regions be limited to the summer season as a first step which in consultation would mean that this area will be only opened to about 100 days between July, August and September.

The local Golf Club needs to be again properly revived and upgraded with new equipment and the greens require to be re-laid. The Consultants would consider an adhoc expenditure of Rs.30 lakhs to be earmarked for improving the greens of the Poonch Golf Club.

Another area of development in this Sector are the meadows of Tosha maidan. The slopes of these meadows may be provided with trekking path and huts for overnight stay may be contemplated. The Department of Tourism would like to put up 4 or 5 trekkers' huts in this area and see the interest of domestic visitors to make use of the facility. The huts would be very frugal in their construction and should provide the base shelter facilities. They should be constructed in the traditional form of architecture using only locally available material of wood, mud and stone. The Consultants wish to earmark a sum of Rs.10 lakhs for the development of these trekkers' huts.

FLORICULTURE

It is an amazing fact to know that Kashmir Valley, which is so famed for its natural beauty and for its vast variety of flowers, has not developed in industry out of the growing of flowers. The Mughal gardens have not evidently inspired the local population or even the business community into undertaking commercial cultivation of flowers, which can be exported out of the State. A small effort was made in 1971 by the Deptt. of Horticulture to open a selling counter of flowers in Srinagar and at Palam Airport in New Delhi. The experiment did not enjoy government support and collapsed after a number of efforts.

Kashmir Valley can offer year round cultivation of flowers for exports. The main variety that can be exported are the whole range of gladioli, roses, seasonal lily varieties and again seasonal 'annuals'. The Chinese crypsamphimums are at their best when grown in the Valley. It is possible to have extensive commercial cultivation of poppy plant. It otherwise grows wild in the area but its commercial cultivation for decorative purposes can mach the quality as found in Holland.

The Consultants would like to recommend the Deptt. of Tourism, to consider in consultation with the Deptt. of Horticulture, Parks and Gardens, and the Deptt of Agriculture to have feasible studies with the help of floriculture experts of South India who have a world market for exporting flowers from the country to find out the commercial potential of developing the commercial cultivation of selective varieties of flowers. In this respect, it would also be necessary to create hot houses to ensure year long cultivation of certain varieties of flowers and particularly long stocked roses. The market is already existing in North India and with the extension of Kashmir rail link the movement of cut flower goods using air-conditioners would ensure the commodity arrives in the market as fresh as it was cut.

The floriculture industry can be a major new enterprise in the Valley and a network of farmers undertaking commercial cropping can be created which would generate employment opportunities of sizeable number. The Consultants hold the view that if the floriculture industry is developed in the State as many as 75,000 jobs can be created which would involve packagers, transporters, air-conditioning assistants, assistant horticulturists, shed managers, and above all individual progressive farmers. In this respect women entrepreneurship can be associated at all points of work in this industry.

The Consultants would recommend the establishment of a separate department of floriculture under the Deptt. of Industries. The ordinary farmer who switch over to this occupation needs to be encouraged and the Consultants would recommend that all earnings from this activity be exempt from taxes and the State and private finance institutions offer very attractive soft loans as well as agriculture consultancy to develop the trade.

The State Government should use its good offices to enter into negotiations with international known floriculture companies for distributing the product to the markets of the Middle-East and South Asia region.

The Consultants also see the necessity of establishing research stations to conduct research in the development of better quality of flower varieties which would conform to international acceptance.

The Consultants propose an initial investment by the Government of India into the development of this proposed industry in its initial stages, an outlay of Rs.800 crores for the Tenth 5-Year Plan, Rs.600 crores for the Eleventh 5-Year Plan and Rs.200 crores for the Twelfth 5-Year Plan. It is hoped that by 2018 the proposed commercial activity would have found its firm on the ground and be consolidated in the private sector. The State Government would be expected only to provide extension consultancies.

FOREST INDUSTRY

100 years ago, reporters were telling their readers that this region was full of thick jungles and forest areas which were mentioned having vast stretches of forests, are today to be seen as bare faces and subject to erosion due to rains and high winds. In the period of militancy advantage was taken by smugglers to cut down valuable forest products and sell them in the black market. A section of the State Government of Forests also contributed to this vandalism.

The forests are a major support base for large number of commercial activities like chemicals, oils, woodcrafts and handicrafts. A small paper manufacturing industry is also famous for the Kashmir Valley. Scarcity of right type of wood is now threatening closure of many small enterprises which are dependent upon good quality wood. The most important wood product moving out of the Kashmir State are the cricket bats made out of willow. Originally the manufacturing of bat blades was prosperous trade but diminishing supply of major wood has led to a shrinkage in the State and this unfortunate.

Tourists are keen to see forests in their tracks or camp in these forests where they exist. Some of the most famous camping grounds are in the upper reaches of Pahalgam, Gulmarg and Sonamarg area. Forests in the higher reaches of Yusmarg and elsewhere can be exploited in camp sites.

The Consultants are of the view that Deptt. of Forests should now be given a higher priority, additional funds and a workforce with the objective to launch a major drive to recreate forests in areas which are originally reported to have them 100 years ago. The lack of forests is also having a very bad effect upon the local climate in the Valley and the average temperatures are rising upto 4 degree Celsius in the summer season. In the early 1950s Kashmir Valley had not seen a ceiling fan but today in the summer season one cannot live without it in a confined room. AC units were non-existence in Kashmir Valley but today all hotels run them in summer season. Ecological disaster is firmly on ground and active.

Experience may be had from the manner in which forests have been regenerated in European Russia, in Finland and in Sweden. If necessary, workforce from other parts of North India be acquired for short duration for planting of identified saplings of tree variety. Nursery may also be developed in Himachal Pradesh for providing support material for regeneration of forestland.

The Consultants feel that the regeneration of forestland would be a long-term project extending for a minimum 20 years and move even beyond.

The Consultants are of the view that for the redevelopment of the forest industry, an initial outlay of Rs.2000 crores in the first 5 years, Rs.10,000 crores in the second 5 years and in subsequent blocks of 5 years additional outlay of Rs.8000 crores be earmarked for this work. This amount of funding would have to be clearly monitored by Government of India and there should be a special agency established to ensure that the planting of saplings in identified areas ensure a survival rate of at least 70%. An audit of the forests so covered should be regularly undertaken. The scheme has sufficient scope for mal-practices and this needs to be always kept in mind.

The Consultants are of the view that when properly planned and executed in the first 5 years period, the project could involve upto 100,000 unemployed persons as forest assistants to look after the saplings for watering and tendering and the work be distributed in the whole of the State including the areas not normally reached. Private monitoring agencies are recommended specially to oversee the work.

No immediate results are expected out of such investment but if the forest cover in the State is restored to double its current green cover, the results on the climate would be very definite leading to many positive side effects. At the same time, the State would have acquired new forest wealth which could invite a very large number of visitors for camping and leisure activities.

The tourist potential would be immense because dry up springs and water would again get recharged and soil erosion into rivers and lakes would have dramatically come down. The listing of positive effects is far too many to be listed in this project.

AGRO BASED INDUSTRIES

The following are recommended :

Negotiations may be reopened with the National Dairy Development Board to consider their re-entering the State with schemes for upgrading not only the skills of farmers undertaking animal husbandry and dairy farming but also develop a network of vegetable collection and marketing them on proper professional lines.

The Consultants have informally discussed this matter with the NDDB who are prima facie willing to respond positively to any invitation from the State Government in this direction but now have certain conditions for response. The most prominent precondition laid before us was that NDDB will only accept an invitation from the State if the State leadership promises not to interfere in the professional work of the Board and its schemes, further the State leadership will not interfere in the selection of personnel for manning the schemes for developing vegetable and dairy marketing. And lastly, the State will provide sufficient power supply to run the modern dairy plants on scientific lines.

At the same time, the Board also has offered to the Consultants' suggestion that the Board would like to invest in the next 20 years anything upto Rs.5,000 crores of financial outlay in making the State of J&K a modern agriculturally oriented administration; that it would introduce new breeds in animal husbandry, create brand products for the local market and train local persons in proper management skills for sales and marketing and manufacture. The Board will not take money from the State Government and will find its finances from within the country and also from international investment agencies. Subject to getting State clearance the NDDB would be willing to invest in the first five years of planned activities a sum of Rs.100 crores to develop the base for future industrial activities related to animal husbandry.

The State is, therefore, recommended to take the initiative to open fresh correspondence with the NDDDB HQrs and send a delegation to meet the experts in the various sectors of dairy developmental activities. Products which may be generated from such an enterprise then be put into the local markets and a specific quota be fixed for distribution in tourist related hospitality industry. The surplus can be exported into Punjab and other areas.

The Consultants recommend the revival of the wooden products industry in collaboration with Indian and international product leaders. For instance, a small-scale industry for the manufacturing of match-sticks using local wooden products should find local markets instead of the match-sticks being brought from far away places in India.

The famed Kashmiri paper product industry needs to be revived both in the handicraft sector as well as in the small-scale sector. Kashmiri wooden crafted paper had the ability to last beyond 200 years and was an export product to many Asian centres of learning where this paper was used for transcribing Holy Scripture. The technique exists and the technicians are now without work. Similarly paper-making using mechanical process and local wooden pulp is no more an organized activity and needs the intervention of Indian experts. The Consultants feel that the paper industry in Kashmir has a big potential for revival and the State should seek urgent outside help in this respect.

The Consultants are of the view that the existing State citizenship legislation requires afresh reading to allow for some recognition of investment and labour by persons of non-Kashmiri origins to be recognized and given status and protection. If this is not done no major industrial house in India would be willing to invest within this State its resources. The Consultants have come around to the view that industrial and economic growth in the State of J&K is unlikely to fully succeed if it has a majority participation by the State Government and that private entrepreneurship will have to be welcomed by offering softer provisions in law and protecting the investments by new legislation. The manner of modifying the State citizenship law is left to the genius of the local administration and the Consultants refrain from offering an alternate model of legislation.

The Consultants feel that a programme be developed for the local farmers meant for the three regions of the State and these persons in groups may be attached with selected Agriculture Universities for short and medium term orientation courses in progressive farming.

The Consultants were surprised to know the scarce presence of low horsepower tractor farming system in the Valley. The farming techniques are in need of upgrading. The absence of modern equipment is expanding away by the existence of very small sized land ownership which is a fact no denied.

The Consultants feel that a private enterprise may be encouraged to establish businesses in the loan of agriculture equipment to farmers who need to be introduced to modern techniques in farming and thereby increase the agricultural produce.

In any perspective planning for the State it would be necessary to contemplate industrial activities which draws energy from non-fossil fuel sources. The future of industrial growth in the State lies wholly in the availability of inexpensive power energy through the Hydel general system. Poor planning in this respect in the past has led mal-practices to come in the agriculture system.

The Consultants now feel that the old standard practice of charging farmers of a flat rate per plug or bulb be now replaced by a modern system of billing power consumers by installing power meters. The work should be undertaken districtwise.

There seems to be no problem in this respect for Jammu region. In Ladakh region, the physical work of meter-reading may have to be given on contract to local educated youth who would have to act as collector of revenue.

In Kashmir Valley the Consultants find the problem more emotional and recommend a long period of educating the local population first and then implement the system of billing by meters districtwise. The collection of revenue will bring a sense of responsibility amongst the local people in the realization of the taxes which are essential source of revenue for the State to undertake future developmental activities.

The Consultants feel a resistance coming upon those persons or leaders who would bring the necessary changes in their financial administration.

The Consultants also recommend as a first step to bring the collection of power taxes under a contract system to be run by private enterprise using the system which has been successful elsewhere in other parts of the country.

In Ladakh region, the Consultants are of the view that breeding of Yak, Pashmina goat and Cheeru deer should be considered as valid government activity.

The milk yield from the existing mountain cows is insufficient for economic benefit and cattle breeding centres in more numbers are essential. These cattle breeding centres will also train villagers in better methods of cattle rearing and looking after the medical problems related to local animal life.

A small breeding centre exclusive to improve the population of the Nubra camel be created.

The old activity in this respect was not found sustainable because of lack of interest by those given the responsibility as no status was assigned to this work.

The Consultants feel that the breeding of the double hump camel should be in the direction of preserving animal life which is facing an extinction and people associated with the work to protect and promote the preservation of such fauna, need to be given a special status in society. The same is the case for the breeding and preservation of wild ass. The Consultants have already recommended the establishment of a zoological park near Leh in Ladakh. This activity can be an add on with the zoological park for Ladakh area. It has a huge tourist potential.

The State Government should invite selected agriculture universities of India to locate their extension centres in places of their choice. The extension centres should be given the responsibility to help educate the farmers in modern methods of farming, be partners in the development of new crops genes which would find local easy application as cash crops as well as select young farmers for training as envisaged in some paras above.

Cattle breeding centres undertaking research activities should also be opened to tourist visits and information in this respect in future should find mention in tourist brochures.

ZOOLOGICAL GARDENS

The State of J&K does not have even one Zoological Garden. This is inspite of the fact that the State is rich in wild life and has even exclusive forms of wild life isolated in alpine area. To some extent, marginal compensation exists by declaring area in the State as National Wild Life Parks. The most notable of these sanctuaries is the Dachigam sanctuary, which protects the Hangul deer.

Dachigam is otherwise not easily accessible to outsiders because it is a protected place. Visitors to the region are therefore, denied glimpses of wildlife consisting of local animals and birds. Again the absence of zoological parks also deny students of science to undertake clinical observations of the various animals species known to live in the region. The more rare and protected species are also not being bred in captivity in the absence of good zoological facilities.

The consultants recommend that the State of J&K should have two zoological gardens one based in the Valley of Kashmir, and another to be located in Ladakh region.

The favored site for locating the Zoological Garden in the valley is at Atharbal located about 45 kms from Anantnag. This is a neglected area, which has a vast potential for tourism. The area also has undeveloped land, which can be acquired for creating the zoological gardens. The local unemployed youth can be trained to work in this garden in various supports services essential to such activities. The zoological garden at Atharbal shall have a large bird pond, a serpentarium, large enclosures with safety moats to keep animals. The lion and tiger enclosures are recommended to be of sizes up to four acres each to allow the animals privacy leading to breeding in captivity. The zoological park is envisaged to cover about six hundred acres of forest and waste land. The site selected should also include atleast two prominent water streams. Visitors may be taken round the garden by a merial system rope way, and by animals safaries using battery powered vans. Visitors may be offered access to this place from Srinagar and Anantnag as a day tour by the Department of Tourism. The charge should also include the cost of meals and drinking water. The zoological park at Achabal should have a full-fledged veterinary hospital, which should be also serve the veterinary requirements of villages located in the radius area of about 20 kms. The zoological park should be attached with the Department of zoology. University of Kashmir and arrangement should exist for visits by the graduate and post graduates students in this subject.

The second zoological garden is recommended for location at Upshi. It should contain a large birds pond and large enclosures to put on display the wild life of the area. Visitors will only be allowed movement in this park on foot. The zoological park is expected to cover approximately 15 acres. It shall have a veterinary hospital, which will be open to provide vet. services to local cattle owners in the Indus Valley in all villages between Koyul, and Choglamsar located along river Indus.

The officers appointed to manage the zoological parks can also take help during emergencies from the veterinary services available locally from the Army and ITBP which departments maintain separate cadre of veterinary doctors.

The consultants are not offering advise on the cost of each project or the number of persons to be employed. This may be addressed to the Department of Animal Husbandry who will made available of the opportunity to first examine the existing facilities of zoological parks in India, take advises of experts from identified centres undertaking similar activities in Asia and then submit their plans.

As a rough rule of the thumb the capital cost of developing the zoological garden as Atharbal is Rs. 9.00 crores, while for the zoological park in Indus Valley, the capital cost of raising the infrastructure will be approximately Rs. 5.50 crores.

HANDICRAFTS

The Consultants have already recommended the development of the handicraft shops carrying the 'Q' label to ensure that tourists are given a good deal when they are purchasing handicraft material manufactured in the State.

The Consultants would like to recommend that the State Government may encourage the 'Q' shops to be also owned and run by educated women entrepreneurs. This will open avenues of employment for a large number of educated women of Ladakh and Kashmir Valley.

While no firm numbers can be offered, the Consultants are of the view that at the peak of popularity of such a scheme at least 6,000 women can be easily absorbed into this trade practice.

DEVELOPMENT OF MUSEUMS

Inspite of the fact that the region is rich in various artifacts connected with anthropology archeology and other social sciences, and that it has been the ancient seat of culture which have been historically traced back for atleast 3500 BC, museum activity in the State has been very poor.

Srinagar has one State museum, which is a gift from an earstwhile Maharaja of Kashmir. This museum has been poorly maintained.

A plan to shift the museum exists to bring it on the Boulevard Road and remove it from its present position where it does not catch the eyes of visitors. The new scheme is dependent on local expertise on museumology and its anybody's guess of how the new State Museum will take shape at the time of its inauguration.

Jammu region also has a small museum based in the city which is not visited by people, as one would desire. There is no promotion campaign to even attract the local children to this establishment.

Ladakh region is totally bereft of any museum. This is surprising because this region is full of evidence of its ancient past and also because it was the main highway of the ancient Silk Route to Central Asia and China. Leh town was a major commercial transit point for all merchants who started their journey from the vicinity of Ambala and ending quite often in Central Asia, while this goods they carrying reached Beijing and in the court of Canghez Khan.

The Consultants recommend the development of Museums in Leh and Jammu on proper international standard which need to be filled up by original or copy models of sculpture, artifacts, manuscripts and anthropological material which will educate the viewers on the progress of civilization in the region, on the principle development in the history of the people and illustrate the unique culture of the region.

The Consultants also recommend the development of a new series of local museums referred to as ethnological museums which are big galleries filled with models illustrating the various dresses worn by the people in the region in the past, exhibit local items of interest for tourists like fire arms manuscripts, flora and fauna models a typical village scene of to the local area, geological samples and information on local dialects and jewellery etc. These ethnological museums should be accommodated in all places where Notified Areas Committees are functional. The museum should have an attached restaurant, parking places and a shop selling local handicrafts. Its location should also be made known prominently through signage installed on the side of the main highways.

These local museums should be supervised by retired teachers who may be given an orientation course on items on display and be assisted by selected students again drawn from the local urban sector and employed as contract employees for each season. The maintenance of these ethnological museums will be by the Department of Tourism and not by other departments normally associated with such activities.

The concept of ethnological museum has not taken root in India. Therefore we are unable to offer a local model. They are part of a system which can be readily seen in all the principle towns in Bulgaria and also in Australia where habitation, have been developed out of the original aboriginal centers.

We are particularly recommending the development of these museums to create opportunities to the visiting tourists in the region to fill up their time profitably when they are visiting the local areas for short stay. The average cost of developing ethnological museum would be Capital cost Rs.30 lacs,

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non-recurring cost of creating displays – Rs 18 lacs, recurring expenditure on administrative expenses and contracted staff – Rs 4 lacs.

The cost of developing the museum at Jammu and Leh, in approximate, will be as under :

Capital infrastructure at Leh	- Rs 80 lacs
Capital infrastructure in Jammu	- Rs 60 lacs
Non-recurring cost of developing displays at Leh	– Rs 30 lacs
Non-recurring cost of developing displays in Jammu	- Rs 45 lacs
Recurring cost on admn.charges & maintenance at Leh	– Rs 6 lacs
Recurring cost of maintenance & contracted staff at Jammu	– Rs. 8.5 lacs

FRESH WATER AQUARIUMS

The waterways in the region are rich in aquatic culture. Exotic variety of fish were introduced in a large number of streams in the valley to provide the sport' of fishing to the foreign tourists. The big lakes in the region both in the valley and outside are also well stocked with fish, yet there is limited knowledge on availability of piciculture. It is felt that identified areas within the State be given new fresh water aquariums which will also be opened to visits by tourists. The Consultants are recommending the aquarium under the head of the museum because the general activity is of putting in showcases living samples of life which are meant for the education of the viewers.

The Consultants advise that fresh water aquarium be considered in Srinagar, Pahalgam, Leh, Baramula, Gandarbal, and Shopian. The fresh water aquarium may also be local centers for the sale of fish, and fish products for tourists and local population. An important feature of the aquarium would be its proper up keep, sanitation and viewing facilities. Not only the local fish varieties and other marine life is also put on display. Efforts should be made to improve on the collections in marine life by acquiring other samples from the fresh water world. The aquarium should be visited by school children compulsorily and be open to all visitors. A small entry fee for adult should also be charged to recover the cost of maintenance either totally or partially. The Department of Fisheries should be the nodal agencies to maintain these establishment, while the Department of Tourism will act as inspector to a ensure high standard of hygiene is maintained to attract the tourists to this place.

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Aquarium are being maintained in Mumbai and Chennai on a commercial basis and The Consultants advise that at the time of framing the projects, official, of the state government from the Department of Fisheries officiaires should visit the working centers identified, and accept consultancies to make their labour worthwhile. The aquarium should also be so designed as to provide for expansion in their activities for future.

PRIVATIZATION

The terms of reference does not ask for providing any inventory of all tourist properties in the state. As regards the privatization strategy, it may not be possible to give separate strategy for each and every individual property. The properties which could be privatized are essentially belonging to either the State Government or the State Tourism Development Corporation, hence the strategy will be more or less, the strategy as decided by the state government.

URBAN HAAT

A plan for setting up a cultural complex

The State Government has already planned and executed projects to locate cultural centres in the 3 geographical divisions of the state.

The consultants are familiar with the activities and the principle operating in the institution of Dilli Haat. The concept of Dilli -Haat is very difficult to emulate in other states of the Union particularly the hill states, where the tourist season is not a year round activity. In the state of J & K, Ladakh division offers only 2 months of tourist activities, Kashmir valley offers about 5 months and Jammu division offers about 7 months. Similarly, Jammu area attracts only religious tourism and there is no other business prospering or looked forward to which would be outside the services provided for religious tourist. Under these circumstances replicating the experiment of Dilli Haat is an uneconomical activity.

The consultants have also examined the view to provide a multi cultural center in each of the division in the state and have come to a conclusion that in the circumstances of uneven development of the tourist infrastructure as well as the promotion of cultural handicrafts and other icon activities, it is necessary to protect the delicate cultural fabric of the various minorities social group and promote them otherwise vigorously to attract the attention of the incoming tourist. Promoting other cultural

activities of societies outside the state would provide unfair competition. The consultants after due deliberations decided not to offer any proposals in this respect.

SCHEMES

Schemes and Incentives to be provided by State Government to the Private Sector.

The land areas may be earmarked in the state on the basis of their current status of development. Developed land areas should not be offered to the private sector. In the under developed areas incentives should be offered on the basis of their remoteness from main land / centres. For very remote areas the private sector may be leased land on token charge. The lease should be for 15 years and would be subject to review depending on the developmental activity undertaken. In less remote areas and still underdeveloped areas a lease rate may be determined and offered to the private sector. No lease shall be more than 15 years duration. Water may be offered in bulk at a predetermined rate, which will not be changed for a period of 5 years from the year of commencement of notified activities of the individual members in private sector. Spring water will not be used for commercial or industrial activity. Power – Private entrepreneurs will be allowed to maintain a captive generating plant not exceeding 125 KVA. The SEB should create guidelines for the installment and maintenance of the private captive generating plants. Sales Tax holiday for goods being sold within the state for 5 years should be provided. Luxury and entertainment tax : In the hospitalities industry it should be maximum of 5% of total tariff above 800/- per day and for entertainment trade the tax tariff, 15% for live entertainment, 35% for cinema shows. Tax holiday should be provided for 3 yrs for cine plex and new cinema halls constructed.

FINANCIAL IMPLICATIONS

The Chapter on Financial implications provides the details of the expenditure on the projects as recommended phase wise from 2003 to 2023. The tables provide the total funds required, the phases of development and the funds to be invested by the Central Government and the State Government. It also provides the implementing agencies of various works.

The projects identified are viable and feasible and are as per the requirement of the development of the tourism, which is site specific. The overall investments in the projects has been indicated in the tables and the phase wise investments are also indicated. The existing project of the Government of J&K have already been taken care of in the 10th five year plan, which should be completed as per the schedule. The tables also provide the employment generation form the various projects.

For the sustainable development of Tourism it is essential to involve the local people in the planning and implementation of various projects. There should be participation of various grassroot stakeholders at various phases of implementation.

In the end a summary table has been provided (refer Table No. 14.2) to have a glance of all the projects investments. Also a table has been provided which gives the investments breakup in the infrastructure development, human resources development, tourism product services and promotion and marketing.

Table No. 14.3 gives the description of the total investments to be made in the State of Jammu & Kashmir in the next 20 years for development of sustainable tourism. Total investments works out to be 130039.10 crores.

Table No. 14.4 gives the description of the breakup of the investments, the cost configuration and phasing of investment in short, medium and long term and has been categorized under broad heads such as basic infrastructure, tourism infrastructure, product development, human resources development, promotion publicity and marketing strategy.

Table No. 14.1
PHASE WISE INVESTMENTS

Project	Duration of Project	Total Outlay (In crores)	Phase wise Expenditure				State Share	Central Share	Implementing Agency	Employment Generation
			2003-2008	2008-2013	2013-2018	2018-2023				
1. Expansion of Srinagar airport	2003-2008	100	50	50		10	90	Min. of Civil aviation	500	
	2008-2013									
2. building new holding areas	2003-2008	20	20				20	Min. of Civil aviation	500	
3. additional checking counters for officials and passengers.	2003-2008	2	2			0.25	1.75	Min. of Civil aviation	500	
4. luggage holding areas,	2003-2008	0.5	0.5				0.5	Min. of Civil aviation	500	
5. passenger vehicle parking area,	2003-2008	0.5	0.5				0.5	Min. of Civil aviation	500	
6. reception areas etc.	2003-2008	0.5	0.5				0.5	Min. of Civil aviation	500	
7. phased review of the expansion of the Airport Complex may be taken up	2003-2008	1	1				1	Min. of Civil aviation	500	
8. Total review of existing arrangements of airport security	2003-2008	2	2			1.5	0.5	Min. of Defence MHA, J&K Govt.	500	
9. short haul identified routes	2003-2008	10	5	2.5	2.5	8	2	J&K Govt.	1000	
	2008-2013									
	2013-2018									
10. State airline service (19 routes)	2003-2008	30	20	5	5	20	10	J&K Govt.	1000	
TOTAL		166.5	101.5	57.5	7.5	39.75	126.75		6000	

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Project	Duration of Project	Total Outlay (In crores)	Phase wise Expenditure					State Share	Central Share	Implementing Agency	Employment Generation
			2003-2008	2008-2013	2013-2018	2018-2023					
11. Helicopter taxi service	2003-2008	50	30	20			5	45	J&K Govt. Pawan Haus Corporation	1200	
12. Develop the Srinagar Airport as an international hub of air traffic.	2003-2008	1000	200	400	400		100	900	Min. of Civil Aviation	500	
13. New Project studies in the identified countries of Central Asia	2003-2008	2	2						2 Min. of Civil Aviation		
14. Single rail track system between Khatse, Nimmo, Leh, Upshi, up to Nyoma	2008-2013 2013-2018	1100	10	350	700	40	400	700	Min. of Railway	1500	
15. Short rail track in Kargill (Zanskar Valley) – between Mulbakh, Kargil and Sanku	2003-08	350		100	100	150	100	250	Min. of Railway	400	
16. Feasibility survey on these suggested routes	2003-08	30	12	12	6			30	Min. of Railway	400	
17. Modules for short stay in remote areas	2003-08	10	2	2	4	2	5	5	J&K Govt.	15000	
18. Cost of erection of the dry dock facility	2003-08	0.5	0.5					0.5	Min of Tourism	50	
19. Standards signages approved by the Indian Road Congress	2003-08 2008-2013	2	1	1			0.25	1.75	J&K Govt. Min. of Urban Dev.	30	
TOTAL		2544.5	257.5	885	1210	192	610.25	1934.25		19080	

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Project	Duration of Project	Total Outlay (In crores)	Phase wise Expenditure				State Share	Central Share	Implementing Agency	Employment Generation
			2003-2008	2008-2013	2013-2018	2018-2023				
20. Way side amenities	2003-08	5	1	2	2	1	4	J&K Govt. Min. of Urban Dev.	30	
21. Drinking water facilities on the highways	2003-08	0.5	0.5			0.5		J&K Govt. Min. of Urban Dev.	30	
22. Twenty years Development Plan created by the State PWD (R&B)	2003-23	600	250	100	150	150	450	J&K Govt.	3000	
23. Traffic training schools/ Parks (Leh, Srinagar Baramula Anantnag, Jammu, Udhampur, Rajouri and Katra)	2003-08 2008-13	16	6	10		8	8	J&K Govt JK Police	500	
24. Inspection centres for inspecting all commercial vehicle	2003-08	2	1	1		2		J&K Govt. Deptt. of Transportation	500	
25. Statewide use of traffic signals using solar power	2003-08 2008-13	5	1	2	2	0.5	4.5	JK Police	500	
26. Air conditioned and dust free buses service with built in facilities	2003-08	8	6	1	1	2	6	J&K Govt Deptt. of Transportation	2000	
TOTAL		636.5	265.5	116	155	164	472.5		6560	

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Project	Duration of Project	Total Outlay (In crores)	Phase wise Expenditure					State Share	Central Share	Implementing Agency	Employment Generation
			2003-2008	2008-2013	2013-2018	2018-2023					
27. Air conditioned cabs	2003-08	1.5	1.5				1	0.5	J&K Govt Deptt. of Transportation	6000	
28. Preparation of detailed road maps using the GPS system	2003-08	5	2	2	1		0.25	4.75	J&K Govt. House Deptt.	6000	
	2008-13										
29. Commissioning of a cartographic project to create city maps of Srinagar, Anantnag, Gulmarg, Pahalgaoon, Leh, Jammu, Katra	2003-08	1.4	1.4					1.4	J&K Govt. House Deptt.	20	
30. Designated centres to be called JK World Tourism Bureaus in Israel, Iran, Italy Austria, England Germany & South Korea	2003-08	12	12				5	7	Dept of Tourism J&K Govt.	300	
31. Re-aligning of existing road away from the Lake shore going to Himachal Pradesh area	2003-08	2	1	1				2	J&K Govt. DW & BRO	100	
TOTAL		21.9	17.9	3	1	0	6.25	15.65		12420	

Project	Duration of Project	Total Outlay (In crores)	Phase wise Expenditure				State Share	Central Share	Implementing Agency	Employment Generation
			2003-2008	2008-2013	2013-2018	2018-2023				
32. Upgrade the existing tourist facilities at Lama Yaru monastery (petrol pump and parking facility for 20 cars and 20 HTVs/buses)	2003-08	0.7	0.7			0.5	0.2	J&K Govt. Deptt of Tourism	100	
33. Tourist complex	2003-08	2	2			0.5	1.5	J&K Govt. Deptt of Tourism	20	
34. Redevelop Maitrie Statue area as an alpine garden	2003-08	5	3	1	1	1	4	J&K Govt. Deptt of Tourism	60	
35. Upgradation of Kargil town	2003-2008 2008-2018	1000	200	500	300	200	800	J&K Govt, Min of Urban, Min of Tourism	1000	
36. Road breasting	2008-2013	10		10		2	8	J&K Govt. Deptt of town & country plans	500	
37. Upgradation of tourist hotel managed by the Tourist Department	2003-08	0.5	0.5			0.5		PWD	60	
TOTAL		1018.2	206.2	511	301	204.5	813.7		1740	

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Project	Duration of Project	Total Outlay (In crores)	Phase wise Expenditure					State Share	Central Share	Implementing Agency	Employment Generation
			2003-2008	2008-2013	2013-2018	2018-2023					
38. De-congest the old Anantnag	2008-13 2013-18	1000	100	500	400		100	900	J&K Govt.	500	
39. Development of Ethnological Museums in Udhampur,	2008-2013	3		3			2.5	0.5	J&K Govt. Deptt of Education	10	
40. Development of Ethnological Museums in Poonch	2008-2013	3		3			2.5	0.5	J&K Govt. Deptt of Education	10	
41. Development of Ethnological Museums in Kathua	2008-2013	3		3			2.5	0.5	J&K Govt. Deptt of Education	10	
42. Development of Ethnological Museums in Riasi	2013-2018	5				5	3	2	J&K Govt. Deptt of Education	10	
43. Development of Ethnological Museums in South Kashmir (Anantnag)	2013-2018	5				5	3	2	J&K Govt. Deptt of Education	10	
44. Development of Ethnological Museums in North Kashmir Baramullah	2013-2018	5				5	3	2	J&K Govt. Deptt of Education	10	
45. Development of Ethnological Museums in Ladakh (Kargill)	2003-08	5	5				3	2	J&K Govt. Deptt of Education	10	
46. Fresh Water Aquariums at Srinagar	2003-08	0.5	0.5				0.5		J&K Govt. Deptt of Fishing	10	
TOTAL		1029.5	105.5	509	400	15	120	909.5		580	

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Project	Duration of Project	Total Outlay (In crores)	Phase wise Expenditure					State Share	Central Share	Implementing Agency	Employment Generation
			2003-2008	2008-2013	2013-2018	2018-2023					
47. Fresh Water Aquariums at Pahalgam	2008-13	0.5		0.5			0.5		J&K Govt. Deptt of Fishing	10	
48. Fresh Water Aquariums at Leh	2008-13	0.8		0.8				0.8	J&K Govt. Deptt of Fishing	10	
49. Fresh Water Aquariums at Baramullah	2008-13	0.8		0.8				0.8	J&K Govt. Deptt of Fishing	10	
50. Fresh Water Aquariums at Gandharbal	2008-13	0.8		0.8			0.8		J&K Govt. Deptt of Fishing	10	
51. Fresh Water Aquariums at Shopian	2003-08	0.8		0.8			0.8		J&K Govt. Deptt of Fishing	10	
52. Zoological Park in Atharvan (Kashmir)	2008-13	2		2				2	J&K Govt. Deptt of Forest	75	
53. Zoological Park in Hemis (Leh)	2003-08	3	3							50	
54. Triangle Air Traffic of Leh-Srinagar-Jammu	2003-08	0.3	0.3				0.1	0.2	J&K Govt. Min. of Civil Aviation	20	
55. Incentive Air Fares for South India originating traffic	2003-08	1.5	1.5					1.5	Min. of Civil Aviation Tourism	20	
56. Destination specific LTC Scheme	2003-08	0.5	0.5					0.5	Min. of Personnel	20	
57. Perspective Growth in Creation of New Bed Capacity	2003-08	500	300	100	100		200	300	J&K Govt.	20	
TOTAL		511	305.3	105.7	100	0	202.2	308.8		255	

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Project	Duration of Project	Total Outlay (In crores)	Phase wise Expenditure					State Share	Central Share	Implementing Agency	Employment Generation
			2003-2008	2008-2013	2013-2018	2018-2023					
58. Developing Power Potential in Hydel Schemes	2003-08 2008-13	35000	15000	10000	10000		10000	25000	J&K Govt. Min. of Power	25000	
59. Improvement of Jhelum Embankment between Sangam and Zero Bridge Dry Dock for Houseboats in Srinagar	2003-08	1	1					1	J&K Govt. PWD	100	
60. Development of Model Kilometer Roads in three Regions	2003-08	5	5				4	1	J&K Govt. PWD	30	
61. Opening of Traffic Training Parks at Leh	2003-08	0.75	0.75					0.75	J&K Govt. J&K Police	10	
62. Opening of Traffic Training Parks at Jammu	2003-08	0.75	0.75				0.75		J&K Govt. J&K Police	10	
63. Opening of Traffic Training Parks at Srinagar	2003-08	0.75	0.75				0.75		J&K Govt. J&K Police	10	
64. Opening of Traffic Training Parks at Baramullah	2003-13	1	0.5	0.5			1		J&K Govt. J&K Police	10	
65. Opening of Traffic Training Parks at Anantnag	2013-18	1			1		0.5	0.5	J&K Govt. J&K Police	10	
66. Opening of Traffic Training Parks at Udhampur	2008-13	0.75		0.75			0.75		J&K Govt. J&K Police	10	
67. Opening of Traffic Training Parks at Rajouri	2003-08	0.75	0.75					0.75			
TOTAL		35011.75	15009.5	10001.25	10001	0	10007.75	25004		25190	

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Project	Duration of Project	Total Outlay (In crores)	Phase wise Expenditure					State Share	Central Share	Implementing Agency	Employment Generation
			2003-2008	2008-2013	2013-2018	2018-2023					
68. Opening of Traffic Training Parks at Katra	2003-2008	0.75	0.75				0.75				
69. Development of Wayside Public Facilities on all state and national highways	2003-08	10	10				3	7	J&K Govt. PWD Deptt. of Tourism	10	
70. Installation of standard road signages on all registered roads	2003-08 2008-13	5	3	2			2	3	PWD	10	
71. Opening of fuel dumps on all roads used by tourists & transport systems	2003-08	0.5	0.5				0.5		J&K Govt. Deptt. of Tourism	400	
72. Development of Transport Policy	2003-08	0.5	0.5				0.5		Deptt. of Transportation	400	
73. Development of commercial vehicles inspection team and inspection pits	2003-08	1	1				0.75	0.25	Deptt of Transportation	150	
74. Designing the Citizen's Charter in the Department of Transport	2003-08	0.2	0.2				0.2		Deptt of Transportation	5	
75. Formation of State Transport Board	2003-08	5	5				5		Deptt of Transportation	25	
76. Formation of State Transport Council	2003-08	3	3				3		Deptt of Transportation	20	
TOTAL		25.95	23.95	2	0	0	15.7	10.25		1020	

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Project	Duration of Project	Total Outlay (In crores)	Phase wise Expenditure					State Share	Central Share	Implementing Agency	Employment Generation
			2003-2008	2008-2013	2013-2018	2018-2023					
77. Rail Survey in Jammu	2003-08	30	30					30	Min. of Railway	100	
78. Rail Survey in Poonch	2008-2013	10	10					10			
79. Rail Survey in Anantnag	2008-13	20		20				20	Min. of Railway	100	
80. Rail Survey in Neoma – Choglamsar-Khalsey	2008-13	6			6			6	Min. of Railway	100	
81. Rail Survey in Mulbec – Kargil – Suru	2008-13	30		30				30	Min. of Railway	60	
82. Completion of Ring Road in Kashmir Valley	2003-08	100	100					20	PWD, BRO	100	
83. Development of Wireless Communication Network in all private taxis and Government Bus Transport	2003-08	3	3					1.5	J&K Govt. Deptt. of Tourism	300	
84. Tourist Complex at Nyoma	2003-08	0.75	0.75					0.75	J&K Govt. Deptt. of Tourism	30	
85. Tourist Complex at Lama-Yaru	2003-08	0.75	0.75					0.75	J&K Govt. Deptt. of Tourism	30	
86. Tourist Complex at Khalse	2003-08	0.5	0.5					0.5	J&K Govt. Deptt. of Tourism	30	
87. Tourist Complex at Chushul	2003-08	0.5	0.5					0.5	J&K Govt. Deptt. of Tourism	30	
88. Tourist Complex at Kardoz	2003-08	0.75	0.75					0.75	J&K Govt. Deptt. of Tourism	20	
TOTAL		202.25	146.25	50	6	0	21.5	180.75		900	

Chapter- XIV A Financial Implications

20 Year Perspective Plan for Sustainable Development of Tourism in the State of Jammu And Kashmir

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Project	Duration of Project	Total Outlay (In crores)	Phase wise Expenditure				State Share	Central Share	Implementing Agency	Employment Generation
			2003-2008	2008-2013	2013-2018	2018-2023				
89. Tourist Complex at Mulbec	2003-08	1	1					J&K Govt. Deptt. of Tourism	20	
90. Upgrading of Kargil – Sonamarg Road	2013-18	50	50					BRO	500	
91. Redevelopment of Mughal Gardens at Achabal, Rajouri & Parimahal	2003-08	20	8.75	8.75	2.5	10	10	Deptt. of Tourism	400	
92. Repairs of Gardens at Kokarnag, Berinag & Anantnag	2003-08	16	16			8	8	Deptt. of Tourism	100	
93. Development of Alpine Gardens at Leh	2003-08	5	3	2		2	3	Deptt. of Tourism	100	
94. Opening of a School for Gardeners	2003-08	1	1			0.5	0.5	Deptt. of Tourism	20	
95. Creation of Standing Committee of Experts in Horticulture and Gardens	2003-08	0.2	0.2			0.2		Deptt. of Tourism	20	
96. Administrative Cost for entry fee collection for Nishat and Shalimar Mughal Gardens	2003-08	0.4	0.4			0.4		Deptt. of Tourism	20	
97. Regulating Future Traffic to Vaishno Devi	2003-08	0.2	0.2			0.1	0.1	J&K Govt.	100	
98. Creation of New Anantnag Development Authority	2003-08	10000	1000	6000	2000	1000	9000	J&K Govt. Deptt. of Tourism Min of urban	5000	
99. Creation of New Shopian Development Authority	2003-08	5000	200	3000	800	1000	4000	J&K Govt. Min of urban dev	4000	
TOTAL		15093.8	1280.55	9010.75	2802.5	2000	13072.6		10280	

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Project	Duration of Project	Total Outlay (In crores)	Phase wise Expenditure				State Share	Central Share	Implementing Agency	Employment Generation
			2003-2008	2008-2013	2013-2018	2018-2023				
100. Development of City GPS Maps for Srinagar, Anantnag, Gulmarg, Pahalgam, Leh, Jammu & Katra	2003-08 2008-13	0.1	0.05	0.05		0.1		J&K Govt.	50	
101. Entertainment	2003-2008	500	500				500	Min. of I&B	1000	
102. International Film festivals annual	2003-2008	33	33				33	Min of I&B	200	
103. Street lights	2003-2008	800	400	200	200	100	700	Govt of J&K Min of Urban Dev	200	
104. Repairs of Hot pools 20m	2003-2009	1	1				1	Govt. of J&K	20	
105. Facilities	2003-2008	0.7	0.7			0.7			25	
106. Regenerate Sheep farm at Daksum	2003-2008	10	10			5	5	Govt of J&K Min of Agri.	20	
107. Upgrading Facilities in Poonch	2003-2008 2008-2013	40	30	10		10	30	Govt of J&K Min of Urban Dev	500	
TOTAL		1384.8	974.75	210.05	200	0	115.8	1269	2015	

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Project	Duration of Project	Total Outlay				Phase wise Expenditure				State Share	Central Share	Implementing Agency	Employment Generation
		(in crores)	2003-2008	2008-2013	2013-2018	2018-2023	2003-2008	2008-2013	2013-2018				
108. Relaying Poonch Golf Club	2003-2008	0.5	0.5								0.5	Min of HRD	20
109. Tourist Centre Leh	2003	5	5								5	Min of Tourism	200
110. Tourist Centre Kargil		5	5								5	Min of Tourism	20
111. Upgrading TRC Srinagar	2003-2008	4	4							1	3	J&K Govt.	20
112. Boat club in Nagin	2003-2008	0.2	0.2								0.2	Min of Tourism	10
113. Plenatarium in Leh	2003-2015	1.75	1.75								1.75	Min of HRD	10
114. Dev. Of Kupwara urban Dev. Authority	2003-2008	16000	1000	10000	3000	2000				4000	12000	Min of Urban dev.	2000
115. Bandipur Urban Dev. Authority	2008-2013	30000	1000	10000	10000	9000				5000	25000	Govt of J&K, Min of Urban	5000
116. Master plan survey for Srinagar	2003-2008	6	6							6		Govt of J&K	500
117. Master plan for Srinagar Upgradation	2008-2018	25000		5000	8000	12000				5000	20000	Govt of J&K, Min of Environment	10000
118. Railway line in Anantnag Pahalgam	2013-2018	600			600					100	500	Min of Railways	300
119. Tunnel Simphta pass	2003-2008	60	60							5	55	Govt of J&K, Border Roads	50
120. Development of Bungush Valley	2008-2013	35		10	25					10	25	Govt of J&K, Min of Tourism	2000
121. Development Lolab Valley	2008-2013	40	20	20						10	30	Govt of J&K, Min of Tourism	2000
122. Tourist Bungalow at Charare sharif & support service both Yusmarg chare sharif	2003-2008	5	5							1	4	Govt of J&K, Min of Tourism	200
123. Sky Rail airport to Srinager town	2008-2018	630		200	430						630	Min of Railways	500
TOTAL		72392.45	2107.45	25230	22055	23000				14133	58259.45		22830

Table No. 14.2

SUMMARY CHART

Table nos.	Duration of Project (In crores)	Total Outlay	Phase wise Expenditure				State Share (In crores)	Central Share (In crores)	Total (In crores)	Employment No. of Persons
			2003-2008	2008-2013	2013-2018	2018-2023				
1	166.5	101.5	57.5	7.5	0	166.5	39.75	126.75	166.5	6000
2	2544.5	257.5	885	1210	192	2544.5	610.25	1934.25	2544.5	19080
3	636.5	265.5	116	155	100	636.5	164	472.5	636.5	6560
4	21.9	17.9	3	1	0	21.9	6.25	15.65	21.9	12420
5	1018.2	206.2	511	301	0	1018.2	204.5	813.7	1018.2	1740
6	1029.5	105.5	509	400	15	1029.5	120	909.5	1029.5	580
7	511	305.3	105.7	100	0	511	202.2	308.8	511	255
8	35011.75	15009.5	10001.25	10001	0	35011.75	10007.75	25004	35011.75	25190
9	25.95	23.95	2	0	0	25.95	15.7	10.25	25.95	1020
10	202.25	146.25	50	6	0	202.25	21.5	180.75	202.25	900
11	15093.8	1280.55	9010.75	2802.5	2000	15093.8	2021.2	13072.6	15093.8	10280
12	1384.8	974.75	210.05	200	0	1384.8	115.8	1269	1384.8	2015
13	72392.45	2107.45	25230	22055	23000	72392.45	14133	58259.45	72392.45	22830
TOTAL	130039.1	20801.85	46691.25	37239	25307	130039.1	27661.9	102377.2	130039.1	108870

Table No. 14.3
TOTAL INVESTMENTS

Duration of Project	Total Outlay (In crores)	Phase wise Expenditure			State Share	Central Share	Employment
		2003-2008	2008-2013	2013-2018			
20 Years	130039.1	20801.85	46691.25	37239	27661.9	102377.2	108870

Table No. 14.4

TOTAL INVESTMENTS BREAK UP

	Total Investment	Total Investment- Basic Tourist Infrastructure	Total Investment- Tourism Products Services	Total Investment- Human Resource Development	Total Investment- Promotion & Marketing
2003-2008	20801.85	12481.11	3120.28	2080.19	3120.28
2008-2013	46691.25	28014.75	7003.69	4669.13	7003.69
2013-2018	37239.00	22343.40	5585.85	3723.90	5585.85
2018-2023	25307.00	15184.20	3796.05	2530.70	3796.05
	130039.10	78023.46	19505.87	13003.91	19505.87

FUNDING TOURISM PROJECTS

New Economic Package 2002

Our work has been made somewhat light in the announcement by the Prime Minister of India of an economic package for the State of J&K, which provides an expenditure of Rs.66 crores. In this announced economic package certain key areas in the infrastructure which were contemplated by us in our recommendations are not now being mentioned to avoid overlap. In some of the other areas we shall make a brief recall and then give our own proposals. All expenditures calculated in such cases will be in real of long terms schemes.

In formulating our schemes and proposals herein we have suffered a distinct feeling that the state administration in general has worked on adhocism. This shows up in the case of developmental work in tourism. We have failed thus to discern a Tourist Policy in practice.

If we invite tourists into the State; it is necessary to have a plan for the infrastructure of welcome. This does not exist.

Foreign Investments In Hotels and Tourism Related Industries

The Hotel and Tourism related industry has been declared as a high priority industry for foreign investment. It is now eligible for approval of direct investment upto 31 % of foreign equity. Non-Resident Indian Investment is allowed upto 100% in such ventures. Applications for such investments receive automatic approval by the Reserve Bank of India, provided the criteria for automatic approval is met. Automatic approval is also available if the fee for technical and consultancy services including fee for Architect, Design, Supervision etc. does not exceed 3% of the capital cost of the project (less

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cost of land and finance) Three per cent of the net turnover are allowed to be paid to the foreign collaborator for franchising and marketing/publicity support. Management fees (including incentive fees) upto 10 per cent of gross operating profit are permitted.

The above norms are applicable provided the collaboration is proposed with the companies running/managing hotels with atleast 500 rooms.

The parameters mentioned above are applicable only for obtaining automatic approval from the RBI for foreign technical collaboration in respect of the hotel sector. As such the norms prescribed for other industries i.e. lumpsum payment of Rs. 1 crore, 3% royalty for domestic sales and 8% on sales over a period of 10 years from the date of agreement or 7 years of commencement of production are not applicable for the hotel sector. The application for automatic approval for such foreign technology agreements has to be submitted in Form FC (RBI) to the Reserve Bank Of India, Exchange Control Department, Shaheed Bhagat Singh Road, Bombay-400 023.

Proposals for foreign technical collaboration in the hotel sector which are not covered by the norms indicated above will be dealt under the normal procedure. Applications in respect of such proposals have to be submitted in Form SC (IA) to the Secretariat for Industrial Approvals, Ministry of Industry, Udyog Bhavan, New Delhi.

Development Cooperation Agencies and Tourism

Development Cooperation: A Brief Summary

Development objectives inevitably vary across agencies and countries. Nonetheless, there are several objectives and focus areas that are common across many, if not most, development agencies. They include:

- Reduce the number of people living in extreme poverty.
- Invest in social development, especially education, primary health, and population control.
- Facilitate public participation in political and economic life, especially for women.

- Reduce social inequalities.
- Pursue sustainable development to ensure environmental resource loss is reversed.
- Facilitate stable economies and good conditions for an active private sector.
- Promote well-functioning governments and bureaucracies, including democratic control, respect for human rights, and rule of law.

Though these objectives are fundamental and do not all involve tourism, tourism development is generally consistent with them. For example, tourism typically involves an active private sector and creates jobs of varying skill levels and for both genders, which can help to reduce social inequalities. In addition, it can contribute to sustainable development and the preservation and enhancement of environmental resources. The EU notes that tourism can also make a major contribution to integrating developing countries into the world economy, which is one of the EU general objectives for development cooperation.

The effective development cooperation requires the right timing and the right mix of money and ideas. Money has a large impact, but only in low-income countries with sound management; before countries reform, finance has little impact. More specific findings are as follows:

Development Cooperation and Tourism: Overview and Selected Agencies

Turning to tourism in particular, development cooperation has focused relatively rarely on tourism *per se*. More common has been funding for items like airports and roads, which contribute to tourism, other economic sectors, and society generally. Recently, tourism has also benefited from funding of environmental programs, which often include a tourism component (e.g., biodiversity projects under GEF, and the DFID and USAID programs discussed below). Nonetheless, substantial funding has also gone to tourism-specific activities, including marketing and financial assistance to tourism businesses.

Assistance has occurred in three main forms:

- technical assistance, especially in the preparation of tourist development plans;
- loans for major infrastructure projects; and
- loans and equity investments in the private sector, especially in hotels.

The form of assistance has varied across organizations.

For example, inter-governmental agencies like the Organization of American States (OAS) have emphasized technical assistance and plan preparation. The IBRD (International Bank for Reconstruction and Development) and IDA (International Development Association) components of the World Bank Group have concentrated on tourism infrastructure, while the IFC (International Finance Corporation) component has concentrated on the private sector. Historically these agencies and other multilateral banks have primarily encouraged large-scale projects with a high degree of non-local participation. However, they have, to varying degrees, moved in the direction of small and medium sized businesses (SMEs) community development, and other focus areas consistent with the above strategies.

For example, the Inter-American Development Bank (IDB) has changed the emphasis of its participation and focus in the tourism sector, especially since the beginning of the 1990s. Instead of financing the mega development of new destinations, such as Cancun and Bahías de Htatulco (1970s) the IDB is more responsive to host communities and their sociocultural, man-made and natural environments. Special emphasis is being placed on indigenous communities. The three principal areas for the Bank's participation in tourism development are:

- management of the environment and natural resources;
- improvement in the quality of services provided by municipalities; and
- rehabilitation of physical infrastructure to reclaim historical and cultural heritage.

The IDB increasingly is focusing on financing operations that will include, among others, the following principal components:

- establishment of an appropriate public sector framework (both legal and regulatory) that will allow private sector investment and organized civil society to participate;
- establishment of certification mechanisms; and
- human resources training modular programs for both the public and private sectors.

Likewise, the World Bank stresses that we must develop a broadly owned framework for investment and tourism development. Private investors, public authorities, and local community groups need to work on several fronts, to:

- forge an investment climate of policies, regulations, and public infrastructure that conserves heritage areas and tourist sites;
- help local communities develop attractions and businesses;and
- forge business linkages between investors and local producers and services."

The increasing involvement of bilateral assistance in tourism suggests an increasing grant orientation. It has been suggested in the ecotourism context that a combination of loans and grants are critical in promoting community tourism ventures, with loans going to businesses and grants going to training local residents to participate in these businesses. This follows the logic of private and public goods, with local employment being valued by broader society, which can therefore be expected to pay the additional cost of bringing local residents into the industry. Similar logic can be applied to other programs, including information and communication, research, and so on. Given that grant funding from multilateral institutions is decreasing over time, a loan/grant combination may increasingly depend on coordination between multilaterals (for loans) and bilaterals (for grants)

The remainder of this section summarizes the tourism-related activities of selected agencies.

World Bank

The World Bank turned away from specific tourism projects following the close of their Tourism Projects Department in 1978. Nonetheless, portions of the World Bank Group (WBG) notably the International Finance Corporation (IFC) and the Multilateral Investment Guarantee Agency (MIGA) do support tourism through equity investments, insurance, guarantees, and other mechanisms. As of WTO's 1996 publication on development financing, the IFC had invested in over 100 tourism projects, mainly hotels and resort villages, at a value of close to \$0 million.

Tourism represented 5.5% of the IFC's portfolio at that point. In addition, Bank and Global Environment Facility (GEF) projects focused on other activities, especially infrastructure, human resources, and environmental management, often have a tourism component. The Bank will likely continue with such nonspecific, but tourism related, activities. As Bank President James Wolfensohn noted in the context of cooperation with the WTO, "In the 140 countries where we operate, tourism has become one of the fastest growing economic sectors. Our aim is to create a framework of power, water, health, justice, and financial systems that will be conducive to the development of tourism and to travel." The Bank may also be moving toward more direct involvement in tourism, with its cooperation with WTO being an example. MIGA observes that tourism really deserves the support of the World Bank, because when properly managed it is an excellent way of alleviating poverty."

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Bank involvement in tourism has been facilitated by its small, community based programs through the Learning Innovation Loans (LILs) and the Development Grant Facilities (DGFs). The LILs provide opportunities to integrate CMI into local and national economic development. These will serve as pilot projects for developing approaches to site planning and conservation, as well as improving available sources of information about conservation.

DGF funding is minimal by Bank standards (no more than \$0000) and is focused on determining, and preserving, what community residents value. Relevant potential areas for DGF include

- 1) community managed low impact tourism development,
- 2) participatory assessment of cultural assets along with participatory priority-setting and planning,
- 3) programming and use of communications media to link cultural traditions to sustainable development (e.g., theater, literature, conservation of oral history, cultural radio programming) and
- 4) development of crafts marketing.

One particular activity worth noting is the development of a strategy paper focused on tourism in Africa. Principles noted in the strategy include the importance of:

- an environmental component, such as ecotourism;
- engagement in community participation;
- promotion of effective institution building; and
- working with private industry to enhance their competitiveness.

The World Bank Institute (WBI) has organized various relevant conferences, including one focused on the Architecture of Historic Cities and another on Cultural Heritage and Development: Sustainable Management. In 1999, they hosted a conference in Florence, Italy on the economics of cultural heritage development projects. WBI will introduce a course in tourism in the near future.

UNDP

Little information regarding the role of United Nations Development Programme (UNDP) in tourism development was received in time for this report. They often work with WTO and are involved in human resource development projects, such as the Institute for Hotel and Catering Services hotel training center in the Maldives. They are also supporting development of a tourism master plan for

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Malawi, which includes a focus on creating employment in rural areas and conserving the country's natural environment and cultural heritage. However, UNDP appears to concentrate more on other sectors, such as social development or urban development, that ultimately help tourism. UNDP also supports some micro-enterprise programs. According to the WTO, less than 0.001 percent of UNDP funding goes to cultural projects. The agency does have a Sustainable Cities program that started in Dar Es Salaam and now involves a dozen projects focused on developing the infrastructure and capacity building institutions of developing urban centers.

EU

As noted by the EU, over the last 20 years the European Community has led the way in providing support for the expansion of tourism in the developing countries.... Tourism features in all the EU's framework cooperation agreements (Lomé Convention, Barcelona Declaration, et c.) Article 122 of Lomé V provides that support should focus on 1) human resources and institutional development, 2) product development, 3) market development, and 4) research and information. Relevant activities have also been undertaken in other contexts, such as tourism training and promotion for Mediterranean countries under the Barcelona Declaration. In addition, other EU programs relate to tourism and/or CML, with one example being the Asia URBS program, which ties EU cities with Asian cities to assist in urban development.

As an example of EU activities, it is supporting the St. Lucia (West Indies) Heritage Tourism Programme, whose mission is to establish nature/heritage tourism as a viable and sustainable component of the country's tourism product. Program areas include 1) public awareness and community mobilization, 2) human resource development, training, and institutional strengthening, 3) product development, 4) policy development and advocacy, and 5) niche marketing.

AfDB

Enquiries to the African Development Bank (AfDB) were not successful in generating information, but a search of the Bank's Web site indicates that tourism is funded, at least as part of broader projects. For example, the Third Line of Credit to Development Bank of Mauritius (a loan of \$5 million) had as an objective to "contribute to the further development of Mauritius's small- and medium-scale enterprises sector and ultimately to the country's efforts at economic diversification and job creation," with tourism being one of the sectors to benefit from the loan.

IDB

Though Latin America is not a focus area for this report, the Inter-American Development Bank (IDB) is perhaps the most active of the regional development banks when it comes to tourism. Since 1970, the IDB has committed \$1.4 billion in loans to tourism, \$0.3 million in non-reimbursable technical assistance (grants) and \$9.4 million in Multilateral Investment Fund (MIF) grants. The Inter-American Investment Corporation (part of the IDB Group) has committed US\$1.2 million in loans and US\$2 million in investment funds. The IDB is involved in projects relating to infrastructure, hotel management training, and the protection of cultural heritage. As an example of the latter, in 1995 the IDB provided a \$7 million grant to help preserve prehistoric cave paintings at 20 sites within the Capiwara Park, a World Heritage Site in northeastern Brazil. Two recently approved projects in Brazil are the Preservation of Urban Historical and Cultural Sites - Monumenta Program (\$5 million) and the Technical Cooperation Program to support the Development of Ecotourism in the Brazilian Amazon (\$1 million). Within the IDB group, the Multilateral Investment Fund is an example of a relevant mechanism in this arena. The fund includes 1) a technical cooperation program that assists in the development and modernization of the financial, regulatory and public sector framework needed for an effective, competitive private sector, 2) a human resources development program that helps build the skills and capabilities of the region's work force, 3) a small enterprise development program focuses on broadening the participation of smaller enterprises in the regional economy, and 4) a small enterprise investment fund that demonstrates the use of equity as a development tool.

NORAD

Norway is unusual in that it has a specific political mandate for environmental programs within its development cooperation strategy, which presents a special opportunity for effective action. These programs include the following priority areas within the Preservation of Cultural Heritage and Management of the Natural Environment's Cultural Values' section:

- Implementation and follow-up of recipient countries' commitments under the Convention for the Protection of the World Cultural and Natural Heritage (1972)
- Contribute to enhancing institutional and professional capacities which ensure administrative structures for the preservation of cultural heritage.
- Help to ensure that important sectors accept an independent responsibility for the management of cultural heritage and areas of cultural interest (through, e.g., environmental impact analyses)
- Contribute to the integration of the preservation of cultural heritage in national action plans.

- Contribute to the development of models for sustainable tourism in prioritised areas of cultural interest (Agenda 21)
- Contribute to the sustainable use and development of historical cities and areas of cultural heritage (Habitat II, Urban Sustainable Development)
- Support sustainable production and consumption systems through knowledge about traditional building, customs, use of materials and crafts. To date, the Norwegian Agency for Development Cooperation has supported various activities relevant to the above, such as the Slave Route project and the Africa 2009 training project. However, it has not undergone the type of extended discussion regarding potential involvement in tourism that has occurred in other agencies (like SNV, GTZ, and DFID)

USAID

The US Agency for International Development (USAID) provides financial assistance for tourism-related infrastructure and ecotourism activities as part of its economic development and environmental programs. Development cooperation includes grants to governmental and non-governmental organizations, including technical assistance and provision of equipment. Development cooperation is also available indirectly through USAID-funded programs, such as the Biodiversity Support Program. USAID's involvement in tourism is focused on ecotourism, because it offers countries new opportunities for small enterprise investment and employment and increases the national stake in protecting their biological resources."

Activities are supported out of the biodiversity conservation programs and include developing national park systems (including creation of new parks), demarcating and equipping parks, recruiting and training staff, encouraging government reforms, and promoting regulated investments in private lodging, guide service, and other tourism ventures. A recent review of USAID involvement in this area describes the following focus areas:

- Efforts to empower and encourage local communities to play an active role in the preservation and enhancement of cultural environments and ecotourism sites. This has been accomplished by creating alternatives for local inhabitants to replace revenues formerly earned by utilizing natural resources. These alternatives include tourism-related food, lodging, souvenirs, educational materials, guides, and transportation.

- Efforts to develop strong institutions that are charged with the responsibility of managing and protecting national parks, cultural sites and ecologically sensitive areas.
- Economic linkages between local residents, private business, non-governmental organizations (NGOs) and government agencies to ensure that the bulk of tourist generated revenues remain within the country.
- Strategies to create protected area entrance fees to provide revenues needed to maintain and upgrade sites. This frequently involves employing economic techniques that attempt to estimate tourists' willingness to pay to enter sites.

Though much of this assistance has been for sites focused on the natural environment, it has also gone to cultural heritage, including the Bonampak Mayan ruins in the Montes Azules Biosphere Reserve in Mexico. Perhaps the most comprehensive relevant USAID support is to the Jordan Promotion of Cultural Tourism project, which is designed to promote Jordan's tourist sector by assisting in the development of selected cultural sites. The project is being implemented by the Ministry of Tourism and Antiquities (MOTA). It will 1) enhance selected sites and develop tourist facilities, 2) increase public awareness of, and local involvement at, the sites, and 3) provide institutional development support to MOTA.

DFID

The British Department for International Development (DFID) has recently undergone an evaluation of its role in tourism and has decided to focus on nature tourism in particular. In addition, DFID is trying to bring the focus away from generation of foreign exchange earnings and toward elimination of poverty. This links directly with the development objectives described above, and DFID's goal is to generate net benefits for the poor in the context of tourism development, with net benefits incorporating both benefits (such as jobs) and costs (such as negative cultural and environmental impacts). DFID notes that domestic and independent travelers may create proportionally more local economic opportunities than do international/package tourists, such that selective market development can be appropriate.

SNV

SNV, the Dutch development cooperation agency, also has been active in tourism over the years, and has undergone internal consideration and discussion of desired involvement in this field. The process

is continuing, and SNV held a workshop in Nepal during October 1999 with tourism advisors from countries in which SNV is involved in tourism projects. The objectives of the workshop are to:

- Exchange experiences and share knowledge on the strategies, methods and results of SNV tourism development programs.
- Discuss in depth topics such as: How can local poor people benefit more from tourism development? How can local participation be ensured in tourism programs? How can negative environmental and socio-cultural impacts be mitigated?
- Contribute to SNV's policy development concerning economic themes. The workshop is expected to generate a document presenting the best (and worst) practices of SNV's projects, a better understanding of methodologies and strategies for poverty alleviation in tourism development programs, and an overview of relevant references (documents, manuals, books, publications, etc.) that SNV tourism programs are using. SNV's focus to date is succinctly stated as follows:

By being present in-country (SNV maintains field offices in 26 countries) SNV is able to identify areas that have a potential for tourism. Close cooperation with local people and organisations offers a good starting point from where tourism can be developed: no massive scale luxury tourism but small-scale tourism in which the local population participates to the fullest extent and reaps the benefits. People shape the ideas, execute the plans, gain extra income and retain their dignity. In short, this is tourism for people, culture and the environment.

SNV supports this kind of development through research, training, marketing and the transfer of knowledge and finance. In the past few years, tourism projects have been set up in Albania, Tanzania, Botswana, Nepal, Cameroon, Niger and Benin. This has enabled SNV to build up experience and expertise.

GTZ and BMZ

As early as 1981, the German Federal Ministry of Economic Cooperation and Development (BMZ) published an analysis of 'Tourism in Developing Countries.' This was updated in 1993, and BMZ set up an 'Ecotourism Working Group,' an interdisciplinary task force that combines research and practice-oriented consultancy.

The report 'Ecotourism as a Conservation Instrument,' which appeared in 1995, set out basic policies and case studies. The German GTZ (Deutsche Gesellschaft für Technische Zusammenarbeit) is

responsible for planning and implementing technical cooperation projects with developing countries. A recent GTZ publication⁸⁶notes that: *though tourism is not currently a priority issue in German development co-operation activities, it could be a meaningful development policy option – especially where regional rural development and nature conservation are concerned – if examined critically, planned competently and carried out prudently.*

It goes on to say that the ‘development potential of tourism has been unsatisfactorily exploited.’ Tourism already does play a role in many cooperative projects, and G TZ/BMZ have developed substantial material relating to this topic.

ADB Assistance to Projects

ADB provides financing for projects that will effectively contribute to the economic and social development of the country concerned and have the strongest poverty reduction impact in conformity with the country and ADB strategies.

Project identification may require the help of outside experts, especially in the smaller and less developed DMCs. If so, ADB can provide technical assistance to help a country identify and prepare a project for possible financing.

In evaluating projects, ADB pays specific attention to the

- economic viability, technical feasibility, and financial soundness of projects
- effect on development activity in the country concerned
- contribution to removing economic bottlenecks
- capacity of the borrowing country to service additional external debts
- introduction of new technologies to raise productivity
- expansion of job opportunities
- strengthening of institutions along the criteria of good governance
- integration of environmental and social considerations into ADB projects

SANTEK CONSULTANTS PVT. LTD.
NEW DELHI

SMALL INDUSTRIES DEVELOPMENT BANK OF INDIA (SIDBI)

Scheme for Hotels and other Tourism Related Activities

Purpose : For setting up of small hotels and other tourism related activities.

Eligible Borrowers : New or existing SSI concerns. They should be,generally,at le ast private limited companies.

Norms

Term loan not less than Rs. 15 million. The limits for states of Eastern Region,North-Eastern Region, Jammu & Kashmir and Himachal Pradesh shall be Rs. 7.5 million.

Debt Equity Ratio - Not to exceed 2:1.

JAMMU & KASHMIR STATE FINANCIAL CORPORATION (J & K SFC)

Schemes for Tourist Homes & other Tourism Related Activities

Purpose For providing clean,hygienic accommoda tion to tourists in Delhi and Chandigarh.

- Setting up or Development of Amusement Park.
- Cultural centers
- Restaurants
- Tourist Service Agencies
- Commercial complex as part of Tourist ~~h~~me/~~h~~otel

Eligibility : Individuals,partnership con cerns,Pvt. Ltd. Companies engaged in tourism related activities.

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Project Cost : Rs. 10 Crores

Quantum of Assistance : Rs. 90 Lacs for individuals and partnership concerns, Rs. 240 Lacs for Pvt. Ltd./Ltd. Companies.

Mode of Repayment : Quarterly Installments

JAMMU & KASHMIR STATE FINANCIAL CORPORATION (J & K SFC)

Scheme for Hotels/ Motels/ Travel Agency

With an aim of giving a fillip to the burgeoning Tourism Industry in the state, the corporation provides easy financial aid for establishment of hotels, motels, restaurants, travelling agencies, amusement parks etc. Assistance is also within arms reach for the expansion and refurbishing of existing facilities in the tourism sector.

Purpose : Under the scheme term loan is available to hotels in the small scale sector.

Promoter's contribution : Upto Rs. 10 lacs 25% (DER 31) and above Rs. 10.00 lacs 33.33% (DER

21)

Maximum quantum of loan (Rs. in lacs) : Rs. 240 lacs in case of Companies or co-operative Societies otherwise Rs. 90 lacs

Maximum cost of project : Total fixed assets not exceeding Rs. 10 crores and share capital not exceeding Rs. 10 crores.

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JAMMU & KASHMIR STATE FINANCIAL CORPORATION (J & K SFC)

SCHEME FOR TRANSPORT LOAN

Assistance is available for financing of Load carriers, Trucks, Tippers, Matadors, Tata Sumo, Auto rickshaw, Tourist Taxies and Fleet Owners etc., upto 6 vehicles only.

Eligibility Person having minimum 3 years driving licence. Financial assistance is given to owner driver only.

Promoter's
Contribution 25%

DER 2:1

Quantum of financial Depending upon requirement upto 6 vehicles. assistance

Repayment Period 3 to 5 years with initial 2 months moratorium.

NOTE: All the cases where in loan amount involved is upto Rs. 10 lakhs, the Debt Equity Ratio is to be observed at 3:1

Tourism Finance Corporation of India

Background

Pursuant to the recommendations of National Committee on Tourism set up by Planning Commission of India Limited (TFCI) was sponsored by IFCI along with other All India Financial Institutions and Banks as a specialized All India Development Financial Institution to cater to the needs of the tourism industry so as to ensure requisite priority in funding tourism related projects. TFCI was incorporated as Public Limited Company on 27th January, 1989 and commenced operations from 1st February, 1989.

Resources

The Authorized share capital of TFCI is Rs. 500 crore of which the paid up share capital is Rs. 600 crore, subscribed by IFCI, IDBI, ICICI, UTI, LIC, GIC, SBI, Canara Bank, Bank of India and General Public. TFCI also issues Bonds and raises loans/deposits for mobilizing resources.

Objectives

TFCI provides financial assistance to enterprises for setting up and /or development of tourism related projects, facilities and services which, inter-alia, include hotels, restaurants, holiday resorts, amusement parks and complexes for entertainment, education and sports, safari parks, rope-ways, cultural centers, convention halls, transport, travel and tour operating agencies, air service, tourist emporia, sports facilities etc. Besides, TFCI would also be co-coordinating and formulating guidelines and policies related to financing of such projects. TFCI would also have a development role within the overall policies of Government.

Form of Assistance

TFCI provides all forms of financial assistance for new, expansion, diversification and renovation projects in tourism industry and related activities, facilities and services such as:

- Rupee loans.

- Underwriting of public issues of shares/ debentures and direct subscription to such securities.
- Guarantee for deferred payments and credits raised abroad
- Equipment Finance.
- Equipment Leasing.
- Assistance under Supplies Credit
- Merchant Banking & Advisory Services.

Eligibility for Assistance

TFCI provides financial assistance to projects with capital cost of Rs. 3 crores and above. In respect of project costing between Rs. 1 crore and Rs. 3 crores, TFCI will consider financial assistance only to the extent of unavoidable gap, if any, remaining after taking into account assistance from State Level Institute/Banks is not available, may be considered on exceptional basis even though their capital cost is below Rs. 1 crore. Financial assistance is considered on similar lines for heritage or restaurant projects.

Project with capital cost upto Rs. 3 crores may be financed by TFCI along with the State Level Institutions/Banks. Projects with high capital cost may be financed along with other All India Financial Institutions like IFCI, IDBI, and ICICI. TFCI considers assistance even if the total cost is less than Rs 3 crores for existing concerns with satisfactory performance for renovation/up gradation.

Terms of Assistance and Procedures

The terms/conditions and documentation for assistance would be as per the extant policies and practices of All India Financial Institutions.

Norms for Financial Assistance

A Flexible view would be taken in regard to the norms for financial assistance regarding promoters contribution,debt :equity ratio,moratorium period and repayment period,depending on the merits and circumstances of each case.

The general norms would, however, be as under:

Promoters' Contribution

The minimum promoters'contribution for new project is 30%Relaxation may,however,be allowed in respect of large projects involving capital cost exceeding Rs. 25 crore.

Debt – equity Ratio (DER)

The general norm would be 1.51,but the debt component in each case would depend on the nature of the project and its capacity to service the debt. Relaxation in DER may be considered in case of existing companies with low DER and adequate cash-flows. In such cases DER may be considered upto 21 subject to overall DER for the company being within 1.51.

Moratorium Period and Repayment Schedule

This would depend on the period required for completion of the project and stabilization of operations as also the projected cash flows available for debt-servicing. Maximum repayment period may be allowed upto eight years after initial moratorium of 11/2 to 2 years for hotel project,but in respect of transport sector and similar projects the repayment period would be 3 to 5 years.

Important Approvals/ Requirements

- The applicant concern should have obtained all the requisite Government approvals like building plan from local municipal authorities, land use clearance, star category approved by Department of Tourism, foreign technical/ financial collaboration.
- Tie-up for pre-opening technical and post commissioning operational arrangements should have been completed.
- Clear title to the land should be established
- TFCI should be satisfied about promoters' capacity to bring in their contribution

Fees for processing Applications for Financial Assistance

Appraisal Fee : 0.25% of the Project Cost, The Actual cost of travel, etc. in connection with site appraisal for consideration of the proposal is recovered from the applicant concern.

Legal Charges

- 0.25% of the loan amount subject to a minimum of Rs. 25000 and maximum of Rs. 100000.
- Actual out of pocket expenses, if any, and charges/expenses payable to outside solicitors/advocates, etc. to be borne by the borrower.

.....

On amounts devolving on the underwriters	On amounts devolving on ht underwriters
2.5%	2.5%
2.5%	1.5%
2%	1%

.....

Guarantee Commission : (p.a.)

For giving Guarantees for Deferred Payments: 1.02% For Giving Guarantees for foreign loans: 2.40%

Besides Management fee shall be charged as under:

Upto 5 Years	:	1.05%
Upto 7 years	:	2.10%
Beyond 7 years	:	3.15%

PROJECT PROFILES

In this Chapter we are providing the viable projects which have to be implemented in the next 20 years in the state of Jammu & Kashmir. It is presumed that the State Government would provide adequate support and facilities to the Private Parties for the successful implementation of these projects which would generate the much needed revenue for the State Government.

These Projects have been indicated in the previous Chapter, 'Funding Implications' and the phasing of investments has also been given. The projects have to be implemented as per the phasing plan provided in the previous Chapter.

**PROJECT PROFILE
ON
ONE STAR CATEGORY HOTEL**

1. INTRODUCTION

Hotels constitute an essential economic infrastructure for tourism industry and trade. Hotels are categorized into various types, depending on their relative standard of comfort and usage. Hotels classified as one star are compact budget hotels with a primary focus on economically priced rooms and only essential food and beverage facilities. One star hotels cater primarily to the domestic business traveler Indian families traveling on leisure and in popular tourist locations to budget foreign tourist

2. DEMAND ANALYSIS

Tourism is today the world's largest industry. World tourism arrivals have increased four-fold over the last 25 years. According to successive surveys of Foreign Tourists in India (FTSI) J&K is one of the most popular foreign tourist destinations in India. The inflow of tourists domestic as well as foreign is growing at a reasonable growth rate.

3. LOCATION AND AREA

There is demand for 1 star hotels in all the primary and secondary cities of Jammu & Kashmir. The site area required for the project is 1800 sq. yds. The project is for 45 guest rooms each of a carpet area of 200 sqfts, and one 80 seat restaurant.

4. COST OF THE PROJECT

The project cost is estimated at Rs. 220 lakhs. Details are:

Head	Rs. Lakhs
Land	20.00
Buildings & Civil work	89.10
Plant & Machinery	40.85
Furniture and Fixtures	23.00
Miscellaneous Assets	22.50
Preliminary and preoperative Expenses	5.00
Contingencies	15.00
Margin money for working Capital	2.00
Total	217.45

Say Rs. 220.00

5. UTILITY

Power- Estimated power requirement for the hotel is 100 K.W.
Water - Estimated water requirement for the hotel is 25000 lit. per day.

6. MANPOWER

Employment generation for this project will be 36 persons.

7. RATIOS OF FINANCIAL PERFORMANCE

The project achieves the following financial ratio over a ten years period :

<u>Ratio</u>	<u>Result</u>
Return on investment	25.24%
Return on Equity	30.27%
Internal rate of return	22.03%
Debt Service Coverage Ratio	1.88%
Payback period	4.21%
Break-even Point	46%

**PROJECT PROFILE
ON
HOTEL CUM GOLF COURSE**

1. INTRODUCTION

Jammu & Kashmir is a unique treasure house of India's traditions. Customs and values present a panorama as well as splendor of beauty and natural wealth. Some of the most glorious phases of Indian history are associated with Jammu & Kashmir. Jammu & Kashmir's scenic beauty, rich cultural heritage, historic importance, wild life, adventure sports and colorful modes of life are some of the many attractions to tourists both foreign and those arriving from different parts of India and abroad. The number of tourists from within India is growing. There has been an increase in the number of foreign tourists. Of the foreign tourists, about 50% to 60% are budget tourists who prefer to stay at inexpensive hotels.

2. DEMAND POTENTIAL

Jammu & Kashmir State, as a whole, has got a number of tourist attractions. The average growth rate in total tourist arrivals in the state of Jammu & Kashmir is quite high. In addition to the foreign tourists, the domestic tourist traffic is also steadily increasing. The important tourist places in the State of Jammu & Kashmir are well connected by rail, road and air to either of the ports of embarkation-Delhi & Bombay and are, thus, within the direct reach of about 70% of the foreign tourists visiting India. In addition to tourists (domestic as well as foreign) with the positive signs of rapid growth of businesses in the State, there has been a marked increase in the number of other categories of people visiting Jammu & Kashmir for commercial negotiations, conferences, meetings, joint ventures, etc.

In a nut shell, Jammu & Kashmir offers opportunities for setting up good quality hotels. The important locations which can be considered for such ventures are:

Jammu

- Jammu City
- Kathua
- Katra
- Udhampur
- Doda
- Sansar
- Betote
- Dul
- Riasi

Kashmir

- Magam
- Shopian/Yusanara

Gandnabal

- Sonamarg
- Kargil
- Padam
- Pahelgam
- Gulmarg
- Baramula
- Kokarnag

Ladakh

- Nyoma
- Stok
- Lamayaru

There is a good demand for golf courses in and around Jammu, Udhampur, Srinagar, Kargil, Sonamarg, Baramula, Shopian and Sakti in Ladakh where people can go on weekends and rest.

3. DESCRIPTION OF THE HOTEL

The project profile envisages a hotel of around 100 rooms and the facilities proposed to be included in the hotel are as follows :

- A well spread garden
- 8 to 10 hole golf course
- Club House
- Pantry/Bar
- Spacious dining hall (capacity 100 persons)
- Speciality food restaurant (Capacity 60 persons)
- 24 hours coffee shop (Capacity 40 persons)
- A Bar in the main building (Capacity 20 persons)
- A large conference/Banquet Hall (Capacity 300 persons in the basement)
- Spacious Meeting Room
- Swimming Pool
- Elegant furnishing in traditional style wall-to-wall carpet in the rooms and other areas.
- Channel music and close circuit color TVs in each room.
- Telephone in each room
- Parking space for 30 vehicles.
- Forestation
- 24 hours hot and cold water facilities.
- A shopping arcade
- An open air bar/beverage/restaurant
- Quality stove or wood tile flooring in public lounge, corridors, lobbies and other public places and staircases.
- Air conditioning in some rooms and central facilities, and room heating in all rooms.

About 5 acres of land would be utilized for the hotel and another 10 acres for developing the Golf Course.

4. PLANT AND MACHINERY

The plant & machinery will consist of air conditioning plant, diesel generating set, lifts, boilers, water heating tanks, water filtration unit, overhead and underground water storage tanks and waste water recovery plants etc. All these plants, equipments and machinery are available indigenously and no imports are necessary.

5. RAW MATERIALS

Barring some items like foreign liquor and preserved foodstuffs, all food and beverage items should be available locally. The hotel may enter into regular rate contracts or annual purchase agreements with suppliers for its requirements of various items of regular consumption.

6. ESTIMATED COST OF THE PROJECT

	(Rs. In lacs)
Land (5 Acres)	35.00
Site Development/Forestation/Development of Golf Course	85.00
Building & Civil works	390.00
Built-up area around 6000 sft @ 60/- per sft.)	
Plant and Machinery	75.00
Misc. Fixed Assets/furnishing	80.00
Contingencies @%	30.00
Preliminary Expenses	5.00
Pre-operative Expenses	30.00
Margin Money for working Capital	15.00
	<u>745.00</u>

7. MEANS OF FINANCE

	(Rs. In lakhs)
Share Capital (to be arranged by the promoters)	290.00
Term Loan	455.00
	<u>745.00</u>

8. ESTIMATED PROFITABILITY

DEBT EQUITY RATIO	1.51
BREAK EVEN POINT	45%
CASH BREAK EVEN POINT	25%
EMPLOYMENT GENERATION PER UNIT	125 PERSONS

9. ELECTRICITY

The hotel may require a total connected load of about 400 KW. It will have to apply for necessary sanctions for the supply of power with the concerned State Electricity Board.

It will also have to install diesel generating sets of adequate capacity to meet the immediate requirements of power in case of power failures/cuts imposed by the State Electricity Board.

10. WATER

The hotel at full occupancy may require about 6000 litres of water per day. It may install necessary filtration/Water softening and waste water treatment and recovery plants. An overhead water storage tank of adequate capacity may have to be built to meet the daily consumption of water and also for fire fighting purpose/requirements.

**PROJECT PROFILE
ON
THREE STAR HOTEL**

1. Introduction :Jammu & Kashmir is a unique treasure house of India's traditions. Customs and values present a panorama as well as splendor of beauty and natural wealth. Some of the most glorious phases of Indian history are associated with Jammu & Kashmir. Jammu & Kashmir's scenic beauty, rich cultural heritage, historic importance, wild life, adventure sports and colorful modes of life are some of the many attractions to tourists both foreign and those arriving from different parts of India and abroad. The number of tourists from within India is growing. there has been an increase in the number of foreign tourists.
2. DEMAND POTENTIAL :Jammu & Kashmir State, as a whole, has got a number of tourist attractions. The average growth rate in total tourists arrival in the state of Jammu & Kashmir is quite high. In addition to the foreign tourists, the domestic tourist traffic is also steadily increasing. The important tourist places in the State of Jammu & Kashmir are well connected by rail, road and air to either of the ports of embarkation-Delhi & Bombay and are, thus, within the direct reach of about 70% of the foreign tourists visiting India. In addition to tourists (domestic as well as foreign) with the positive signs of rapid growth of industrialists in the State, there has been a marked increase in the number of other categories of people visiting Jammu & Kashmir for business, commercial, conferences, meetings joint ventures etc.

In a nut shell, Jammu & Kashmir offers a unique opportunities for setting up good quality hotels. The important locations which can be considered as Srinagar, Patni Top, Katra, Udhampur, Kargil, Kathua, Poonch, Jammu, Gulmarg, Leh, Kishtwar, Pahalgam, Sonmarg, etc.

3. TYPE OF HOTELS & FACILITIES :The project profile envisages a centrally air-conditioned hotel of minimum 3 Star category and the facilities proposed to be included in the hotels are as follows :
 - A well spread garden
 - Spacious Dining Hall (Capacity 100 persons)
 - Specialty food restaurant (Capacity 60 persons)
 - 24 hours Coffee shop (Capacity 40 persons)
 - A Bar (Capacity 20 persons)
 - A large Conference/Banquet Hall (Capacity 200 persons)
 - Spacious Meeting Room
 - Swimming Pool
 - Elegant furnishing in traditional style wall-to wall carpet in the rooms and other areas
 - Channel music and close circuit color TVs in each room.
 - Telephone in each room.
 - 24 hours hot and cold water facilities.
 - A shopping arcade
 - An open air bar/beverage/restaurant
 - Stone or teak wood flooring in public lounge, corridors & lobbies and other public places and staircases.

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- Completely centrally air-conditioned hotel.
- 4. CAPACITY : Around 6 double bed rooms.
- 5. ESTIMATED COST OF THE PROJECT :

	(Rs. in lacs)
Land (1000 to 5000 sqMtrs.)	6.00
Site Development	20.00
Building & Civil Works	290.00
Built-up area around 70000 sqft)	
Plant and Machinery	95.00
Misc. Fixed Assets	6.00
Contingencies (5%)	25.00
Preliminary Expenses	5.00
Pre-operative Expenses	30.00
Margin Money for working Capital.	15.00
	60.00

6 MEANS OF FINANCE :

	(Rs. in lacs)
Share Capital (to be arranged by the promoters)	240.00
Term Loan	30.00
	60.00
	-

DEBT EQUITY RATIO	1.51
BREAK EVEN POINT	45%
CASH BREAK EVEN POINT	25%
EMPLOYMENT	125 PERSONS

7. UTILITIES :

- Power 400 KW
- Water 6000 Ltrs/day.

**PROJECT PROFILE
ON
FOUR STAR HOTEL**

1. INTRODUCTION

Hotels constitute an essential economic infrastructure for tourism industry and trade to flourish. Hotels are of various types, depending on their relative standard and usage. 4 star hotels provide luxury guest rooms of superior quality and complete public facilities at a moderate price. 4 star hotels cater primarily to domestic business travelers, upper middle class Indian families traveling on leisure and foreign tourists preferring superior quality luxury accommodations meeting international standards but at a moderate price. 4 star hotels also play a significant role in the social life of local communities for entertainment and social function.

2. Suggested Capacity

The proposed unit may set up a hotel which may have 70 guest rooms, with a restaurant of 80 seats, a coffee shop of 60 seats, a bar/cocktail lounge of 30 seats, a Banquet hall with capacity of 250 persons, one Meeting Room with a capacity of 40 persons, a swimming pool, shopping Arcade and all essential service areas befitting a modern superior quality 4 star hotel.

3. Land and Building

Site area required for the project is a minimum of 3200-4800 sq yards. The total built up area is estimated to be 50000 sqft.

4. Estimated cost of the Project

The project cost is estimated at Rs. 1070 lakhs or approximately Rs. 15.50 lakhs per guest rooms. Details are :

Cost Heads	Rs. Lakhs
1. Land	120.00
2. Building and civil work	242.00
3. Plant & Machinery	210.00
4. Furniture and Fixtures	16.50
5. Miscellaneous Assets	127.00
6. Preliminary and Preoperative Expense	20.00
7. Contingencies	75.00
8. Margin Money for working capital	10.00
Total (rounded off)	1070.00

5. Demand Analysis

Despite the fact that Jammu & Kashmir is one of the most popular tourist destination in India, it accounts for very low percentage of hotel rooms in India at present. It is estimated that overall demand for hotel accommodation in Jammu & Kashmir will increase at a rate of approximately 8-10% p.a over the next ten years requiring a 50% increase in capacity by the year 2010 and a 100% increase in capacity by 2015. Demand for 4 star hotels is restricted to the

pre-eminent tourist centres in Jammu & Kashmir namely Gulmarg, Pahalgam, Bandipore, Sonamarg, Anantnag, Katra, Patni Top.

6. Plant and Machinery

The plant & machinery will consist of air conditioning plant, diesel generating set, lifts boilers, water heating tanks, water filtration unit, over head and underground water storage tanks and waste water recovery plants etc. All these plants, equipments and machinery are available indigenously and no imports are necessary.

7. Electricity

The estimated power requirement for the hotel is 350 KW.

8. Water

The estimated water requirement for the hotel is 35000 lts per day. An underground water storage tank of 1000 KL capacity may be provided to meet the daily consumption of water and also for fire fighting purpose/requirements.

9. Manpower

Each hotel may provide employment to about 150 personnel in category from line workers to managerial.

10. Ratios of Financial Performance

The project achieves the following financial ratios over a ten year period :

Ratio	Result
Return on Investment	23.3%
Return of Equity	27.24%
Internal rate of return	23.24%
Debt service coverage ratio	1.77%
Payback period	4.73 years
Break even point (occupancy)	39.8%

PROJECT PROFILE
ON
FIVE STAR HOTEL

1. **Suggested Capacity :** The unit may set up a hotel, which may have about 200 rooms. The hotel may be centrally air-conditioned and each guestroom may be provided with facilities like 4-channel music, colour T.V. with in house video movies refrigerator and other modern amenities. It may also provide a 24-hour cafe restaurant, cocktail lounge, Indian restaurant, foreign cuisine restaurant, meeting/conference rooms, and swimming pool, fully equipped health club, tennis and squash courts and a shopping arcade.
2. **Location:** The hotel may be set up in State capital or a tourist center, which has large business & tourist potential. Potential in the state exists in Gulmarg, Sinemarg sites on the shore of Wular Lake & city with population of more than 25 lakhs or a big business/ tourist centre.
3. **Land & Building :** The unit may require about 5000 -sq land. It may use about 2500 sqn. of area for building construction. The hotel may have six stories with the top four floors having 50 guest rooms each; the first floor having the dining hall, conference room and cafe; and the ground floor the reception, services and shopping arcade.
4. **Plant and Machinery :** The plant & machinery will consist of air conditioning plant, diesel generating set, lifts, boilers, water heating tanks, water filtration unit, overhead and underground water storage tanks and waste water recovery plants etc. All these plant, equipments and machinery are available in indigenous and no imports are necessary.
5. **Raw Materials :** Barring some items like foreign liquor and preserved foodstuffs, all food and beverage items should be available locally. The hotel may enter into regular rate contracts or annual purchase agreements with suppliers for its requirements of various items of regular consumption.
6. **Electricity :** The hotel may require a total connected load of about 2000 KVA. It will have to apply for necessary sanctions for the supply of power with the concerned State Electricity Board. It will also have to install diesel-generating sets of adequate capacity to meet the immediate requirements of power in case of power failures/cuts imposed by the State Electricity Board.
7. **Water :** The hotel at full occupancy may require about 60 KL Water per day. It may install necessary filtration/Water softening and wastewater treatment and recovery plants. An underground water storage tank of 1000-KL capacity may be provided to meet the daily consumption of water and also for fire fighting purpose/requirements.
8. **Steam :** The hotel may have to install 2 boilers of about 1 tone/hr. capacity each and also clarifiers for hot water.
9. **Manpower :** The hotel may provide employment to about 375 persons in all categories from bellboy to the chief executive.
10. **Effluents :** The hotel may discharge sewage and soil waste into the municipal sewerage system after obtaining the necessary approvals. Some special arrangement will have to be worked out with the municipal authorities for the periodic removal of garbage/kitchen waste.
11. **Estimated Cost of the Project :** The cost of a 200 room 5-star hotel project is estimated at Rs. 70.00 crores.

**PROJECT PROFILE
ON
TOURIST COMPLEX**

1. INTRODUCTION

Tourist Complex is very essential economic infrastructure for tourism industry, in places which can be developed or are potential tourist destinations. These are also compact budget complexes with a primary focus on economically priced retable rooms and only essential food and beverage facilities.

2. DEMAND ANALYSIS

Tourism today is the worlds largest industry and world tourism arrivals have increased four-fold over the last 25 years. According to successive surveys of Foreign Tourists in India (FTS) JK is one of the most popular foreign tourist destination in India. The inflow of tourists domestic as well as foreign is growing at a reasonable growth rate.

3. LOCATION AND AREA

There is demand for Tourist Complex in all the secondary cities of Jammu & Kashmir. The site area required for the project is 1000 sqyds. The project is for guest rooms of a carpet area of 60 sqfts, and one 30 seat restaurant.

4. COST OF THE PROJECT

The project cost is estimated at Rs. 75 lakhs. Details are:-

Head	Rs. Lakhs
Land Development	10.00
Buildings & Civil work	27.40
Plant & Machinery	10.10
Furniture and Fixtures	10.00
Miscellaneous Assets	5.50
Preliminary and preoperative Expenses	2.50
Contingencies	7.50
Margin money for working Capital	2.00
Total	<u>75.00</u>

5. UTILITY

Power- Estimated power requirement for the Tourist Complex is 30 K.W.

Water - Estimated water requirement for the hotel is 10000 lit. per day.

6. MANPOWER

Manpower requirement for this project will be 12 persons.

Development/ Upgradation/ Redeployment of Gardens

1. INTRODUCTION

Gardens are one of the most important attractions for the tourists of J&K. These preserve the age old heritage of the Mughals.

Development & Upgradation of these gardens is of utmost importance to again find the lost glory of the ancient times.

2. DEMAND ANALYSIS

A large number of domestic and international tourists visit these gardens in the tourist seasons and also during the off season the inflow is significant.

3. LOCATION AND AREA

Srinagar, Baramullah, Achabal, Rajouri & Arimahal

4. COST OF THE PROJECT

The project cost is estimated at Rs. 500 lakhs. Details are:

Item	Rs. Lakhs
Land Development, excavation, weeding	100.00
Buildings & Civil work, Path ways, Restaurant	50.00
Laying of turf, garden, plants	100.00
Maintenance	40.00
Irrigation facilities	75.00
Miscellaneous Assets	25.00
Preliminary and preoperative Expenses	50.00
Contingencies	25.00
Margin money for working Capital	35.00
Total	500.00
	-

5. UTILITY

Power - Estimated power requirement for the Garden is 5 K.W.

Water - Estimated water requirement for the Garden is 30000 lit. per day.

6. MANPOWER

Manpower requirement for this project will be 50 persons.

PROJECT PROFILE

OF

MUSEUM

The cost of developing the museum at Jammu and Leh, in approximate, will be as under :

Capital infrastructure at Leh	- Rs 80 lacs
Capital infrastructure in Jammu	- Rs 0 lacs
Non-recurring cost of developing displays at Leh	- Rs 30 lacs
Non-recurring cost of developing displays in Jammu	- Rs 45 lacs
Recurring cost on admn.charges & maintenance at Leh	- Rs 0 lacs
Recurring cost of maintenance & contracted staff at Jammu	- Rs 8.5 lacs

LAYING OF GOLF COURSE AT SONMARG

Sonamarg derives its name from it. It literally stands for 'Meadow of Gold.' The blooming valley has been chiselled over the ages by the local stream, Sindh.

Sonamarg is sheer scenic splendour. The very good metalled road snakes through massive mountains laden with forest and firs. After a breath-taking journey of 27 Kms from Srinagar, one goes over River Sindh at Wayil. Onwards, the valley opens up to a meadow. Kangan and Gund are two important halts enroute. The mountain range here is Harmukh and serves as the ideal. The road takes an incline before sloping into Sonamarg proper. The valley is ringed by mountain scaling 5300 metres in height. Sonamarg has string of shimmering waterfalls and the Thajiwas Glacier. Two lakes Gadsar and Satsar are on the periphery of Sonamarg. This resort falls on the Srinagar-Leh National Highway and is the base camp for trekkers going on adventure trekking to Korakoram peaks.

Via Sonamarg Baltal track is the nearest approach to Holy Amarnath Cave visited by millions of people every year. Though the main route to Amarnath Cave is via Pahalgam yet lot of people used to visit Amarnath via this track and in view of pilgrim rush the govt. has in 1998 declared this track as an official route to the Holy cave. This has further boosted tourist rush to Sonamarg.

Sonamarg is also a halting station for the tourists, which are visiting Leh by surface transport. Due to its good climate a large number of tourists are visiting this tourist spot.

The development of this resort is under consideration for which a Master Plan has already been framed. Accordingly in order to catch the interest of National and International golf players, a 18 hole Golf Course has been proposed to be laid here for which land has been demarcated

COST

The Project shall cost Rs. 362.25 lacs as per the break up given in general abstract of cost enclosed.

TIME OF COMPLETION

The work shall be completed in two working seasons subject to availability of funds and sanction of project.

GENERAL ABSTRACT OF COST FOR LAYING OF GOLF COURSE SONMARG

<u>S.NO.</u>	<u>DESCRIPTION</u>	<u>AMOUNT</u>
1.	Laying of 18 hole Golf Course	Rs. 30000 lacs
2.	Prov. Chain link fencing around proposed Golf Course at Sonamarg	Rs. 51.70 lacs
	Total=	Rs. 351.70 lacs
	Add 3% contingencies	Rs. 10.55 lacs
	G.Total=	Rs. 362.25 lacs

NAME OF PROJECT : DEVELOPMENT OF TOURIST CIRCUIT KOKERNAG

BRIEF HISTORY

Achabal and Kokernag are famous tourist resorts of Kashmir Valley. Kokernag is at a distance of 79 Kms from Srinagar at an altitude of 2012 Mtrs. Achabal lies on way to Kokernag. In Kokernag there is a rose garden where a varieties of flowers and shrubs perfume the air. Kokernag spring gushes out of the base of a thickly wooded hill from were it separates into channels which bear an uncanny resumbleness to the clow-foot of a Cock. Similarly at Achabal a well laid out Mughal Garden exists.

Tourism Department has some time back taken into possession a large chunk of land measuring 315 Kanals adjacent to the existing tourist resort of Kokernag, to develop this area as a full fledged Tourist resort. The Tourism Department had started the development of this resort and had constructed few huts, and a Tourist Bungalow . However, due to the ion of militancy all future proposals were shelved. Now that the law and order situation to this part of the State has improved, the locals citizens have started visit up these resorts. Tourists/pilgrims have also started visiting these resorts. It has therefore been decided that the suspended proposals should be reopened. Some additional accommodation like a Tourist Bungalow, some huts, a recreational centre will be taken up at Kokernag and the existing Mughal Garden at Achabal renovated.. The promenades of both these tourist resorts will be light up at night .

Time of completion

The Project shall be completed in two working seasons subject to availability of funds and sanction of Project.

**GENERAL ABSTRACT OF COST FOR DEVELOPMENT OF TOURIST CIRCUIT,
KOKERNAG- ACHABAL**

<u>S.NO.</u>	<u>PARTICULARS</u>	<u>AMOUNT IN LACS</u>
1.	Prov. & fixing chain link fencing	24.75
2.	Const. of Tourist Bungalow	73.00
3.	Const. of Recreation Centre	71.12
4.	Const. of 5 no. Single bed room huts	38.50
5.	Const. of double bed room huts	73.95
6.	Illumination of promenades	30.00
7.	Dev. & improvement of Mughal Garden Achabal.	50.00
	TOTAL=	366.32 lacs
	Add 3% contingencies =	10.84 lacs
	G. TOTAL=	377.16 lacs
	Say 372.00 lacs	

NAME OF PROJECT **UPGRADATION OF** **CHARAR – I - SHARIEF**
/YUSMARG ROAD

BRIEF HISTORY

Yusmarg as a resort has from times immemorial attraction for the tourist. It has an added advantage that it is located on way between the famous Shrine of **ALAMDAR KASHMIR** the **bl**iest of the **bl**ier, who has bestowed th e vale of Kashmir with his spiritual ecstasy and bliss let us not forget that while we are on way to Yusmarg we hardly miss to pay our homage to the suife sanit '**ALAMDAR**' who is grave is located here.. The location is called as Charari-Sharief and Yusmarg is hardly 22 kms from this spot. Yusmarg touches the borders viz. Budgam and Pulwama. Yet has its own charm without mixing it with any of the Districts.

Presently it is a meadow and once developed can better the known good spots like Gulmarg. This resort is situated 47 kms from Srinagar at an altitude of 2377 Mtrs. Once the Charari-Sherief-Yusmarg road is developed it will take hours drive to reach there. Apart from development of the road the State Government intends to provide some recreational facilities. It is therefore proposed to construct a Recreational Centre equipped with modern facilities of recreation.

PROPOSAL AND SPECIFICATIONS

It is proposed to upgrade the road from Charari-Sharief to Yusmarg which is in a very dilapidated condition by metalling, re-metalling the worst portions and lay 50mm thick macadam with 20 mm thick semidense.

COST

The project shall cost Rs. 289.43 lacs as per the break up enclosed (Abstract of cost)

TIME OF COMPLETION

The work will be completed within two working seasons subject to availability of funds and sanction of project.

ABSTRACT COST

1. Development of Charari-Shrief-Yusmarg Road.	Rs. 231.00 lacs
2. Construction of Recreational Centre	Rs. 50.00 lacs
	Rs. 281.00 lacs
Add 3% work charge contingencies	Rs. 8.43 lacs
TOTAL	Rs. 289.43 lacs

GENERAL ABSTRACT OF AHRABAL-KUNGWATTAN-KOUNSARNAG CIRCUIT

1.	Construction of Tourist Bungalow with cafeteria	Rs. 54.04 lacs
2.	Upgradation of Shopian Aharbal Road by way of Metalling,remetalling 50 mm thick bituminous macadam and 20mm thick semidense with 6mm seal coat.	Rs. 184.25 lacs
3.	Improvement of track from Aharbal to Kungwattan-Kounsarnag	Rs. 13.10 lacs
4.	Const. of 3 no. viewing points	Rs. 4.50 lacs
5.	Illumination facility of the area	Rs. 29.00 lacs
6.	Construction of trekkers hut at Aharbal and Kounsarnag (nos)	<u>Rs. 6.00 lacs</u>
	TOTAL =	Rs. 344.89 lacs
	Add 3% contingencies	= <u>Rs. 10.34 lacs</u>
	G.TOTAL	= <u>Rs. 355.23 lacs</u> Say 355.00 lacs.

TOURIST BUNGALOW WITH CAFETERIA AT AHARBAL

Aharbal is situated at a distance of 15 kms from Shopian and 6Kms from Srinagar on the Southern side of Kashmir Valley under the foot hills of Peer Panchal Range. The place is famous for the impressive waterfall formed by clean and sparkling water of Vishnu river falling from a height of 25 metre. Ahead of Aharbal at a distance of five Kms is a charming woodland meadow called Kungwattan and further Eleven Kms ahead of Kungwattan is a clear fresh water lake Kounsernag which generally remains frozen and covered with an ice sheet till late June. The entire area is a trekker's paradise.

PROPOSAL

It is proposed to construct a Tourist Bungalow with a cafeteria at Aharbal, upgrade the road from Shopian to Aharbal which is in a very bad condition, by metalling, remetalling the worst portion and laying of 50mm thick macadam with 20mm thick semi dense, besides const. of Trekker's Lodges, View points, a recreational park and illumination of the promenades. It is also proposed to improve the existing track from Aharbal to Kungwattan-Kounsernag which is in a dilapidated condition due to its disuse during the past 10-12 years.

COST & TIME OF COMPLETION

The project shall cost Rs. 355.00 lacs and shall be completed in four working seasons subject to availability of funds and sanction of Project.

DEVELOPMENT OF PATNITOP / SANASAR CIRCUIT

BRIEF NOTE

Sanasar and Patnitop are two picturesque tourist resort of Jammu Division. Patnitop is 110 Kms from Jammu on the Jammu-Srinagar Highway. This tourist resort is a developed one and difficult to get accommodation during the peak tourist season. Patnitop being in close vicinity of Mata Vaishnodevi Shrine, as such is being visited by a large number of pilgrims besides leisure tourists. Sanasar is another tourist resort situated at a distance of 17 Kms from Patnitop at an altitude of 800 feet with gigantic conifers, green meadow and a small lake. The connecting road from Patnitop to Sanasar is in a dilapidated condition and the tourists face tremendous inconvenience in visiting this famous tourist resort of Sanasar. These two resorts besides in summer are also being visited by the tourists during winter as the people love to visit their to have a glimpse of snow. The State Government had started winter game activities such as skiing etc at Patnitop. It is proposed to install ski lifts for beginners at Patnitop as the slopes available there are sufficient for beginners. On Patnitop-Sanasar Road a place called Natha Top is having excellent slopes which when developed can till the requirement of advanced ski courses. The activities of winter games can be started in this part of the State only when the road is improved to make it fair weather.

At Sanasar a 9 hole Golf course is available where various golf tournaments have been organized. The foreign experts have declared this spot suitable for paragliding. The Tourists are enjoying paragliding at this spot. With the meagre resources available with the state, this resort could not be developed upto good standard.

Sufficient infrastructure needs to be created there so that the activities are performed in the best interest of tourism promotion.

In the first instance it is proposed to upgrade the road from Patnitop to Sanasar (10 Kms length) which is in a very bad condition by metalling, re-metalling for worst portion and laying of 50 mm thick macadam with 20 mm thick semi dense. A part from this, it is proposed to install the ski lifts at Natha Top where we have ski slopes available and to construct the ski shop and paragliding shop. Besides, some adventure huts are also proposed to be constructed for trainees and the participants of ski and paragliding tournaments, which are being organised by the Department of Tourism in the near future. Once these activities are started in the public sector, the private sector will also come to these resorts for developing standard accommodation etc. The tourist season in both the resorts shall also increase considerably.

COST

The Project shall cost Rs.400.00 lacks.

TIME OF COMPLETION

The work will be completed within 2 working seasons subject to availability of funds and sanction of Project.

SURU VALLEY (KARGIL) ADVENTURE CENTRE

BACKGROUND

Ladakh has emerged as an important tourist destination for foreigners on account of its unique land-scape and rich cultural heritage. Since its opening for foreign tourists in 1974, the region has received extensive exposures all over the world as a mysterious and enchanting land beyond the Himalayas. However, the main promotional focus has been on its ancient Buddhist monasteries which have remained active since their founding centuries ago. On the other hand, one of the most important aspects of the region, which is its vast potential for promotion and development of adventure tourism, has not received due attention.

Kargil received world-wide attention on account of the Kargil conflict of 1990. But the landscape of the Suru and Zaskar Valleys, both of which are ideal for undertaking various adventure activities remained unknown. Suru Valley is the home to the world famous Nun-Kum peak and its half-a-dozen peaks and their glaciers. Similarly in Zaskar Valley. There are a number of glaciers and peaks. Also, both the Suru and Zaskar Rivers, which originate in the Penzil a range, are most challenging water bodies for white water sports such as rafting and canoeing. This region has the requisite scope and potential for developing and undertaking all the mainstream adventure activities.

Although Ladakh is a major attraction from the cultural viewpoint yet the vast potential of adventure has remained so far un-exploited. Availability of requisite equipments and expertise for Adventure Sports in a potential area with accommodation will not only generate interest among new tourists but will also prolong the stay of tourists already attracted to the area.

Another important aspect is the complementary status of Ladakh to Nepal. This region is the alternative during monsoons when almost the entire Himalayas including Nepal are closed to foreign traffic. Being a high altitude desert, the region is ideally suited for adventure activities during the monsoon period i.e. June/September as there is hardly any rain here. The total rainfall does not exceed 10 cm per year. The rivers are full, which is a big advantage.

PROPOSAL

The project conceived would be non-profit, non-commercial aimed at promotion of adventure tourism in the State. The facilities proposed to be kept available to the tourists on meager maintenance charges will cater to the increased demands of tourists and pave way for development of adventure tourism. By having a provision to establish an Equipment Facility Centre as a major base point of adventure

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activities the tourists and other enthusiasts would be spared the burden of importing their personal equipment at high costs and then take that back.

Setting up of a fully equipped Adventure Centre in Suru Valley (Kargil) will develop interest among tourists who do not otherwise come to India for undertaking such activities. One of the main handicaps in the exploitation and development of this area as an attractive adventure destination, is the lack of basic facilities. Panikhar in the Suru Valley is ideally located at the foot of the Nun-Kun massif for setting up of an adventure centre for the development and promotion of various adventure activities. Therefore, an adventure centre is proposed to be set up, equipped with all necessary equipments required for adventure activities as well as accommodation for the prospective tourists interested in these activities. For this purpose, the State Tourism Department has acquired about 100 canals of land near Panikhar, and a detailed plan has been prepared for development of the adventure centre in a phased manner.

The proposal envisages to set up a residential facility at an estimated cost of Rs.50.00 lacs in the first phase, Rs. 77.00 lacs in the second phase, and Rs.113.00 lacs in the third phase.

The equipments required for the adventure centre would be made available from existing sources in the State Tourism Department, as well as the import of other requisite items can be prioritized as a separate Centrally Sponsored Scheme under relevant head.

The Tourism Department has been training local youths in mountaineering and other adventure activities during the past few years, Some of these trained persons would get employment in the proposed centre as Guides and Instructors. The setting up of adventure centre is proposed to be coordinated with various apex bodies in these sports within the country and abroad. The proposed Adventure Centre would be in a position not only to provide facilities for our own youth to undertake these activities but would also attract large number of foreign tourists to the area.

**PROJECTS
FOR STRENGTHENING OF TOURIST INFRASTRUCTURE**

Name of the State/Union Territory	Jammu and Kashmir																														
Name of the Project	Construction of Adventure Centre at Panikhar Kargil.																														
Please give exact location of the Project and access route by Rail/road/air.	Panikhar is situated at a distance of about 70 Kms from Kargil and is accessible through road																														
<u>Existing Amenities</u>																															
Accommodation Please indicate Details regarding approved/unapproved hotels/Rest/house/Dak Bungalows etc.	Tourist Bungalow belonging to J&K Tourism Department.																														
Restaurant/Cafeteria	Tea shops and eateries in the private Sector.																														
<u>Cost of the Project</u>																															
Central Component	Rs. 25.00 lacs																														
State Component	Rs. 25.00 lacs																														
Facilities to be created																															
<u>A) Central Component</u>																															
i) Rooms/Dormitories 2nos	<table border="0" style="width: 100%;"> <thead> <tr> <th style="text-align: left;"><u>Covered Area</u></th> <th style="text-align: left;"><u>Rate/sft</u></th> <th style="text-align: left;"><u>Total Cost.</u></th> </tr> </thead> <tbody> <tr> <td>2172.5 Sft</td> <td>840/Sft</td> <td>1824900.00</td> </tr> <tr> <td>ii) Restaurants/Dinning hall/Cafeteria (One)</td> <td>2072 Sft 886/Sft</td> <td>1835792.00</td> </tr> <tr> <td>iii) Conference hall/lounge/Reception</td> <td>731 Sft 1253/Sft</td> <td>915943.00</td> </tr> <tr> <td>iv) Kitchen/Store/Pantry/Toilet/Passage</td> <td colspan="2">Included in the above plinth area</td> </tr> <tr> <td>v) Lobby, Verandha, equipment room and Kit Store.</td> <td colspan="2">Included in the above plinth area</td> </tr> <tr> <td>vi) Cost of Internal Electrification/Fixtures.</td> <td colspan="2">Rs. 0.70 lacs lump sum.</td> </tr> <tr> <td>vii) Cost of Internal Water Supply/Sanitary fitting. (7 Points) @0.50 lacs.</td> <td colspan="2">Rs. 3.50 lacs</td> </tr> <tr> <td>viii) Centage Charges (CPWD) project work charges/Contingencies.</td> <td colspan="2">Not Applicable</td> </tr> <tr> <td>Total Central Component</td> <td colspan="2">Rs. 50.00 lacs (Out of which Rs. 25.00 lacs will be shared by the State Government.)</td> </tr> </tbody> </table>	<u>Covered Area</u>	<u>Rate/sft</u>	<u>Total Cost.</u>	2172.5 Sft	840/Sft	1824900.00	ii) Restaurants/Dinning hall/Cafeteria (One)	2072 Sft 886/Sft	1835792.00	iii) Conference hall/lounge/Reception	731 Sft 1253/Sft	915943.00	iv) Kitchen/Store/Pantry/Toilet/Passage	Included in the above plinth area		v) Lobby, Verandha, equipment room and Kit Store.	Included in the above plinth area		vi) Cost of Internal Electrification/Fixtures.	Rs. 0.70 lacs lump sum.		vii) Cost of Internal Water Supply/Sanitary fitting. (7 Points) @0.50 lacs.	Rs. 3.50 lacs		viii) Centage Charges (CPWD) project work charges/Contingencies.	Not Applicable		Total Central Component	Rs. 50.00 lacs (Out of which Rs. 25.00 lacs will be shared by the State Government.)	
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iii) Sewerage System	Included in the Sanitary fitting item of Central Share.																														
iv) Approach road.																															
v) Supervision/Compound Walling/Landscaping																															
vi) Furniture and furnishings.	Apart from the fifty percent share of the project the State Government shall meet the cost involved for the items as indicated under State component.																														
vii) Development of Park																															
viii) Work charge/Contingencies.																															
ix) Total State Component.																															
Name of the executing Agency	Engineering wing of the Tourism Department.																														
Schedule of implementation likely date of completion of the project after project the financial sanction is accorded.	One year after the accord of sanction of the																														

TOURIST PLACES

We are providing some of the tourist Places of Jammu & Kashmir which have the largest number of tourists. The potential of accommodating more tourists is still there at these locations and there is full scope of tourism development at these tourist destinations. Both the foreigners and the Indians are visiting these places.

LEH (LADAKH)

General Information:-

Area	97000 SQ km (approx.)
Attitude	Average elevation 3500 Meters.
Climate	Dry cold during winter and dry hot during summer. However temperatures as low as -35. C in winter are not unknown.
Rainfall	Negligible
Best season	May to November
Clothing	summer -Light woolens- Winter - h avy Woolens.
Population	8718 (1981 census)
Languages	Ladakhi,Purik,Balti,English and Tibetan

Link with Major Centers Mode of transportation

Delhi to Leh	Air
Srinagar to Leh	Air
Chandigarh to Leh	Air

The nearest railhead

Jammu 00 Km	Rail
Jammu to Leh	00 Km
Srinagar to Leh	434 Km
Kargil to Leh	230 Km

Mode of transportation with in center:

- 1) Coaches
- 2) Tourists taxis,Jeeps and Jongs
- 3) Ponies and mules

Mode of accommodation available

- 1) Hotels (A-class)
- 2) Hotels (B-class)
- 3) Hotels (C-class)
- 4) Hotels (D-class)
- 5) Hotels (Economy Class)
- 6) Tourist Bungalows

Attraction of the Locations:

- 1) Leh Palace,Namgyal Tsemo,Leh Mosque,Gompa Tremo,Stoc Palace museum,
Samkas Gompa,Spituk Monastery,Stakhma monastery

Sports activities Mountaineering,Trekking, White water rafting,Polo

Near by Attractions:

- Alchi Gompa 6 Km west of Leh
- Choglamsar
- Hemis Gompa 43 Km
- Lamayuru 125 Km
- Likir Gompa 6 Km
- Phiyang Gompa 20 Km
- Shey Palace and monastery 15 Km
- Thiksey monastery 19 Km
- Hemis High Altitude National Park 35 Km

Other Entertainment facility:-

- 1) Cinema
- 2) Cultural Organisation

Shopping facility Handloom carpets, silver and copper trinkets set, paintings handicrafts center at Leh- Local woodcrafts, Metal crafts and Precious Stones can also be pushed- Leh bazaars are interwoven into its lames where a tourist can see the artisan at work and pick up little courier.

LEH FESTIVALS

- 1) SPITUK GUSTOR
- 2) DOSMOCH LEHLIKIR DESH
- 3) STOK GURE TSE-CH
- 4) MATI NAGRANG
- 5) BUDDH PURNIMA
- 6) EMIS TSE-CH
- 7) YURU KABGYAT
- 8) ZANSKAR KARSH GUSTOR
- 9) PHANG TSEDUP
- 10) DAKTOK TSE-CH
- 11) TICKSAY GUSTOR
- 12) CHMDAY ANGCOK
- 13) GALDAN NAMCHOT
- 14) LOSAR
- 15) SINDH DARSAN

INFRASTRUCTURE :

- Bank and money changers
- Hospitals and nursing homes
- Saway Clinic
- Kunfan octenamy Clinic
- Post & Telegraph offices.
- Police Stations

PAHALGAM

GENERAL INFORMATION

<u>Distance</u>	Srinagar to Pahalgam 96Km
<u>Altitude</u>	2130 Meters
<u>Temperature</u>	Summer Maximum 25 C Winter Minimum 10 C
<u>Best season</u>	Mid- April to Mid November
<u>Clothing</u>	Summer Light woolens. Winter Heavy woolens.

Link of Major Centers mode of Transportation

- 1) Srinagar To Pahalgam Air
- 2) Srinagar To Pahalgam Road (Bus, Taxis)

Mode of Transportation within center:

- 1) Ponies and Porters

Category of accommodation:

- 1) Hotels
- 2) Insulated huts
- 3) Tourist Bungalow
- 4) Rented Colony

Attraction of the Location

- 1) Amarnath 47 Km
- 2) Baisaram 2 Km
- 3) Kalahol Glaciers 36Km
- 4) Mamlesvara 1.5KM
- 5) Phirilasan 7 KM
- 6) Shikargarh -----
- 7) Tarsar Lake 35 KM
- 8) Tulian Lake ----- Uia Baisasan
- 9) Clubs
- 10) Chandanwari 16M

Sports allocation ----- Horse riding, Golf, Fishing, Trekking, Table tennis and badminton

Temples : Hindu Shiva temple, Muslim Jama Masjid, Sikh Gurdwara.

Infrastructure—

(i) Bank (Changing money, Travelers Cheques)

(ii) Hospital

(iii) Photographers

(iv) Post & Telegraph Office

(v) Police station

Shopping Facility

Gabbas and namdas purchased from local shop.

GULMARG

General Information

Area 3.5 Km Long, 1 Km Wide **Altitude** 2730 meters

Best Season Throughout the year preference October to March

Clothing Summer : Light Woolens

Winter : Heavy Woolens

Link With Major Centers Mode of transportation ----

Srinager to Gulmarg---- By Road

Srinager to Gulmarg---- By Air

Category of accommodation ---- Hotels

(i) Insulated huts

(ii) New Tourist bungalow

Attraction of the location---- (i) Alpather lake

(ii) Khilanmarg

(iii) Ningal Nallah

(iv) Ziarat of Babareshi

Sports attraction--- Trekking, Horse riding, Golf, Tennis, Sledding, Ski Lifts, Chair Lifts, Hindu

Temple, Muslim Mosque, Sikh Gurdwara, Christian Church.

Infrastructure

1) Banks (With money changing facility)

2) Hospital, Dispensary

3) Post & Telegraph Office

4) Police station, Tourist Palace

Mode of transportation With in Centre-----

1) PONIES

2) SLEDGES

3) PORTERS

SONMARG

Sonamarg, at an altitude of 3000 metres above sea level, 87 km north-east of Srinagar. The drive to Sonamarg is though yet another spectacular facet of country side in Kashmir, this time in Sindh Valley. The Sindh Valley is the largest tributary of the valley of Kashmir. It is upwards of sixty miles long, and valley and deep rock-girt gorge to open grassy meadow land and village-dotted slopes.

Sonamarg, which means 'meadow of gold' has, as its backdrop, snowy mountains against a cerulean sky. The Sindh meanders along here and abounds with trout and mahseer, snow trout can be caught in the main river. Ponies can be hired for the trip up to Thajiwas glacier a major attraction during the summer months.

The climate of Sonamarg is very bracing; but the rainfall is frequent though not heavy, except for two or three days at a time in July and August with fine spell in between.

From Sonamarg, trekking routes lead to the Himalayan lakes of Vishansar (4084 msl), Krishnasar (810 msl) and Gangabal (68 msl). Other lakes in the region are Gadsar, stocked with snowtrout and Satsar, glacier-fed and surrounded by banks of alpine flowers.

A close by excursion is to Baltal, 15 km north of Sonamarg. This little valley lies at the foot of the Zojila, only a day's journey away from the sacred cave of Amarnath. Trekkers can also reach the starkly splendid roof-top of the world - Leh, by crossing over the Zijila Pass

General Information

- | | | |
|-----------------------|------------------------|------------------------|
| 1) <u>Distance</u> | Srinagar To Sonamarg | 87 Km |
| 2) <u>Altitude</u> | 3000 Metres | |
| 3) <u>Best season</u> | October To March | |
| 4) <u>Clothing</u> | Summer - Light Woolens | Winter - Heavy Woolens |

- 5) Link with Major centre mode of Transportation
 - 1) Srinagar To Sonamarg - Road 87 Km.

- 6) Local Transportation 1 - **Ponies and Porters**

- 7) Category of accommodation
 - Tourist Hs
 - Tourist bungalow
 - Rest house
 - JKTDC bungalow

- 8) **Attraction of the Location**
 - Vishanrar Lake, Kishan sar Lake, Gamgabal, Baltal Valley, Zojila Leh, Thajiwas Glacier (summer season), Kangan and Gund, Gadsar, Satrar, Amarnath Cave.

- 9) **Sports attraction** - Fishing, horse riding

- 10) **Infrastructure** - Police Station

SRINAGAR

Srinagar –The Lake City

Srinagar is located in the heart of the Kashmir valley at an altitude of 1730 m above sea level, spread on both sides of the river Jhelum. The *Dal* and *Nagin* lakes enhance its picturesque setting, while the changing play of the seasons and the salubrious climate ensures that the city is equally attractive to visitors around the year.

City Information

Area	105 sq kms	
Altitude	1730 m.	
Temperature	<u>Max</u>	<u>Min</u>
Summer	29.5 C	10.6 C
Winter	7.3 C	-1.9 C
Rainfall	52.9 cms	
Population	93013 (2001 Census)	
Best Season	Throughout the year, though the winter months can be quite cold.	
Clothing Spring and autumn	Light woollens.	
Summer	Cotton/tropical	
Winter	Heavy woollens	
Languages	Kashmiri, Urdu, Hindi, English.	

Where To Stay

HOTELS

In Srinagar there are hotels to suit every requirement in terms of price, location and facilities. The most desirable location for a hotel is considered the *Boulevard*, which overlooks the Dal Lake. Hotel rooms that overlook the lake cost more than those opening in the opposite direction. Dalgate, which is fairly central for shopping and nearest to the Tourist Reception Centre (TRC) has mostly budget

accommodation. Some good hotels are also located in *Sonawar* and *Rajbagh*, which are largely residential areas within 2 kms of the TRC. Also there are several hotels on Residency Road, which is right in the middle of a shopping centre, very close to the TRC. *Lal Chowk*, in the city's centre, has several medium category hotels, mostly preferred by visiting traders.

Category and location of houseboats

Houseboat	No. of	Total No.	Dal	Nageen	River	Naseem	Other
Category	Boats	of rooms	Lake	Lake	Jhelum	Bagh	locations
Deluxe	349	1007	24	76	5	4	-
A-Class	129	310	89	28	10	1	1
B-Class	124	299	85	17	16	-	6
C-Class	134	306	78	9	32	-	15
D-Class	351	772	186	43	79	-	43
G.Total:	1087	204	702	173	142	5	6

The State Tourism Department has classified the houseboats into five categories - *Deluxe*, *A*, *B*, *C* and *D*, corresponding more or less to the degree of comfort and service of hotels.

There are 1087 registered houseboats in Srinagar of which 702 are anchored in the Dal Lake, 173 in the Nagin Lake, 142 on the River Jhelum, 5 on the Dal Lake near Naseem Bagh, and the rest in other water bodies. Among these, 349 houseboats with a combined capacity of 1007 double rooms are in the *Deluxe* class and are mainly anchored in *Dal Lake*, *Nageen Lake*, and *Naseem Bagh*. In addition there are 129 *A-class* houseboats, 124 *B-class* houseboats, 134 *C-class* houseboats and 351 *D-class* houseboats. Detailed break-up of various classes of houseboats and their mooring location are as shown in the above Table.

Places To Visit

Cheshma Shahi and Pari Mahal

Cheshma Shahi or the Royal Spring was laid by Shah Jahan in 162 A.D. It is 9 Km. from the city centre and is famous for a spring of refreshment digestive water. Two kilometers uphill from Cheshma Shahi is situated the Pari Mahal, a school of astrology founded by Prince Dara Shikoh, Emperor Shah Jahan's eldest son who was killed in the war of succession. The Cheshma Shahi-Pari Mahal area has been developed into a Tourist Village.

Nishat Garden

Queen Nur Jahan's brother, Asif Khan, laid the Garden in 163 A.D. It is situated on the banks of the Dal Lake in the backdrop of the Zabarwan hills, 11 Kms. from the district headquarter of Srinagar. The Garden commands a magnificent view of the lake.

Shalimar Garden

The Garden, 5 Kms from the city centre, was built by Emperor Jahangir for his beloved wife, Nurjahan. The garden with four terraces is 539 by 182 meters and gets water from Bawan through a canal lined with fountains. The fourth terrace was once reserved for royal ladies.

Dal Lake

The world famous water body described by Sir Walter Lawrence as the 'Lake par excellence', half a kilometers from the city, is the jewel in the crown of Kashmir eulogized by the poets and abundantly praised by the travelers and tourists. The lake of late has unfortunately, considerably shrunk in size causing concern to environmentalists. The Governments have chalked out an ambitious project to save the lake from extinction. The lake is 3 km divided by causeways into four parts, Gagribal, Lokut

Dal, Bod Dal and Nagin. Two islands, Sona Lank and Ropa Lank, within the lake add to its beauty.

Nagin is the most lovely part of the Dal Lake separated by a causeway.

Sonamarg

Sonamarg, at an altitude of 3000 metres above sea level, 87 km north-east of Srinagar. The drive to Sonamarg is though yet another spectacular facet of country side in Kashmir, this time in Sindh Valley. The Sindh Valley is the largest tributary of the valley of Kashmir. It is upwards of sixty miles long, and valley and deep rock-girt gorge to open grassy meadow land and village-dotted slopes.

Other Entertainment facilities

- 1) CINEMA
- 2) THEATRE (Tayare Hall)
- 3) CLUBS
- 4) GOLF CLUB
- 5) LIONS CLUB
- 6) ROTARY CLUB

Local Transportation

- 1) COACHES
- 2) TOURIST TAXIS
- 3) SCOOTER RICKSHAWS
- 4) MATADOR BUS SERVICE
- 5) CITY BUS SERVICE
- 6) SHIKARAS OR BOATS

Other Nearby Attraction

- 1) Srinagar To Mathan 6 Km
- 2) Srinagar To Martand 4 Km
- 3) Srinagar To Achabal 58 Km

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4)	Srinagar To Avantipur	29 Km
5)	Srinagar To Kokarnag	70 Km
6)	Srinagar To Verinag	80 Km
7)	Srinagar To Daksum	85 Km
8)	Srinagar To Yusmarg	47 Km
9)	Srinagar To Charari sharif	51 Km
10)	Wular Lake	6 Km
11)	Srinagar To Burzaham	24 Km
12)	Dachigam National Park	21 Km
13)	Srinagar To Ganderbal	19 Km
14)	Srinagar To Manasbal	32 Km

JAMMU REGION

<u>Area</u>	20.36 km		
<u>Altitude</u>	305 Meters		
<u>Temperature</u>	Seasons	Max	Min
	Summer	43. C	23. 4C
	Winter	26 C	4.3. C
<u>Rainfall</u>	107 CMS (June to September)		
<u>Best Season</u>	All year but summer are hot (September To April)		
<u>Clothing</u>	summer	- Light cottons	
	Winter	- Woolens	
<u>Population</u>	22336 (1981 Census)		
<u>Languages</u>	Dogri, Hindi, English, Kashmiri		

Link with Major centres mode of transportation

- 1) Delhi To Jammu Air
- 2) Chandigarh to Jammu Air
- 3) Amritsar to Jammu Air
- 4) Srinagar to Jammu Air
- 5) Amritsar to Jammu Road
- 6) Chandigarh to Jammu Road
- 7) Delhi to Jammu Road
- 8) Katra to Jammu Road
- 9) Srinagar to Jammu Road
- 10) Manali to Jammu Road

Jammu is an Important railhead on northern Railway

Mode of transportation centre

- 1) Tourist Taxis
- 2) Scooter Coaches
- 3) Rickshaws
- 4) Tongas

- 5) Mini Vans, Mini Buses

Mode of accommodation available

- 1) Hotels
- 2) Lodges and Guest House
- 3) Tourist Reception Centre
(J&K Tourism Development Corporation)
- 4) Tourist Reception Centre
(J&K Department of tourism)
- 5) Railway Retiring room
(Jammu Railway Station for Railway Passengers)
- 6) Retiring room. (General Bus Stand)
- 7) Dharamshalas
Category of accommodation
 - Hotels. A-B-C- Category
 - Supplementary

Attraction of the Location

- 1) Peer Khoh
- 2) Ranbireswar Temple
- 3) Raghunath Temple
- 4) Ranbir Camal
- 5) Bahu Fort
- 6) Bagh-E-Bahu
- 7) Peer Baba
- 8) Amar Mahal Palace Museum
- 9) Dogra art Gallery
- 10) Mahamaya Temple and City Forest
- 11) Mubarak Mandi Palace

Other Nearby Attraction

-	Jammu To Akhnoor	32 Km
-	Jammu To Batote	113 Km
-	Jammu To Kud	106Km
-	Jammu To Mansar Lake	80 Km
-	Jammu To Purmandal	39 Km
-	Jammu To Patni top	112 Km
-	Jammu To Ramban	102 Km
-	Jammu To Samasar	129 Km
-	Jammu To Sudhmahadev	120 Km
-	Jammu To Surnisar Lake	42 Km
-	Jammu To Vaishno Devi	8 Km
-	Jammu To Kishtwar High (Altitude National Park)	240 Km
-	Jammu To Katra	50 Km
-	Jammu To Gore Kund	
-	Jammu To Mantalai	
-	Jammu To Shivkhori	100 Km
-	Jammu To Dera Baba Banda	75 Km
-	Jammu To Krimchi	
-	Jammu To Jajjar Kotli	35 Km
-	Jammu To Salal Dam and Lake	95 Km
-	To Baba Dhamsar	6

Other Attraction

- Sports Activities - Swimming,Tennis,Indoor Sports Complex Mini Stadium,Fishing, Yoga.
- Trekking,Skiing,Aero sports

Other Entertainment Facility

- Cinema, Theatre, Clubs, Cultural Organisations Auditorium

Shopping facility

- Handicrafts (Veer Mary Jammu) Government Emporium)

Festivals

- Lohri 13 January
- Baisakhi 13 April
- Bahu Mela (March- April, September-October)
- Chaitre Hildash March-April
- Purmandal Mela February-March
- Jhiri Mela October-November
- Mansar Food and Craft Mela

Infrastructure

- 1) Bank and money changers
 - 2) Hospitals and Nursing home
 - 3) Post & Telegraph office
 - 4) Police Station
 - 5) Radha Swami Satsang (Beas)
- 6) Mother Teresa home

KARGIL

Mode of accommodation facility available

- 1) Hotels (A -B -C -D - E Class)
- 2) Economy class
- 3) Tourist bungalows

Attraction of the Location

- 1) Drass
- 2) Suru Valley
- 3) Rangdum
- 4) Mulbekh
- 5) Zamskar
- 6) Karsha
- 7) Burdan
- 8) Phugtal
- 9) Zong-khul

Infrastructure

- 1) Bank and money changers
- 2) Hospital
- 3) Post & Telegraph office
- 4) Police Station

Accommodation Facility

- Tourists Bungalow

EXISTING POTENTIAL TOURIST DESTINATIONS AND CENTRES

In this chapter we are providing the existing potential Tourist locations which can be exploited for diverting the tourist traffic from the over crowded few tourist locations in Jammu & Kashmir. The Government will have to make tremendous efforts to divert the tourists to these places. In this Plan we are contemplating that if these destinations also come on the tourist circuits it would be very beneficial to the local populace on the whole and it would give a kick start to the economy and the development of the area.

Further these locations have to offer various attributes to the very demanding tourists in terms of its virginity, picturesque locations and the scenic beauty which the tourists can get only in this part of India.

List of Existing Potential Tourist Destinations and Centres

Name of location	Inventory of attraction	Infrastructure availability	Degree of Popularity	Volume of Traffic flow
Yusmarg	Scenic Beauty	Its Metalled road up to Srinagar, Tourist Bungalow, Dormitory accommodation	Popular location	Not Available
Aharbal	Beautiful garden/Base of river	Metalled road up to Qigund. and Srinagar	Less popular location	NA
Achabal	The Mughal garden, the spring and the flowing water and the lush green paddy fields apart from the very congenial climate has tremendous promise for development	Tourist bungalow Dak bungalow. Metalled road upto Anantnag	Less popular location	NA
Lolab Valley				
Dakshum Valley	Spot is densely forested and mountainous with fresh water streams defining the physical boundaries.	Daksum is at present accessible by Mettaled road from Anantnag and Achabal via Koranag	Less popular location	NA

Verinag	Spot situated at the foot of Peer Panchal mountains in extreme south of Kashmir valley at the altitude of 186 to 1880 meters above M.S.L .The mughal laid out a small garden and a small canal in the center which is important feature of the moughal gardens The dominant feature of the resort is the Verinag spring which is fountain head of the river Jhelum and the adjoining hill which is covered by lush green dense forest tending grandeur to the garden and its surrounding area	Dak Banglow and its		
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Following locations will be selected for the development and after collecting primary data from Jammu and Ladakh few other places will be included in this list. After assessing the popularity potential and geographical location of the identified locations above point will be taken care of .

ACHABAL

Location

Achabal is located 8 K.M. south east of Anantnag on the Anantnag Kokarnag road. Roads leading to Pahalgam, Anantnag and Koka rnag (Verinag) meet here.

Expanse and Boundaries

The notified area extends from 1/4 mile to 1/2 mile on various roads meeting at Achabal. The total expanse of the area is 797 acres. A steep forested hill exists on the south east.

Achabal with its strategic location, the Mugal garden, the spring and the flowing water and the lush green paddy fields apart from the very congenial climate has tremendous promise for development. Due to its size and scale it has limitations, yet it can be developed into a beautiful tourist spot.

Achabal has tremendous advantages in respect of its geographic location in the eastern region. It is centrally located being five miles from Matton, and has direct link with Pahalgam. However, it is not very surprising that the place has not developed, so as to attract reasonable tourist traffic. Achabal is perhaps the spot in the eastern region which will automatically benefit from the development of other tourist spots like Verinag, Kokarnag, Daksum and Pahalgam, Aishuqam, Matton etc.

At present all the principal tourist routes touch this point. In addition, most of the tourist traffic by car also visit the spot. Tourist traffic by car including both guided as well as unguided visiting Kashmir valley. This may be attributed to the radial pattern of the arterial roads which coverage at Achabal.

There is a strong similarity between the road pattern and the pattern of the water bodies (stream) in Achabal. These water bodies, along with the settlements and the tourist areas when developed in a comprehensive and integrated manner have vast potential for attracting tourist traffic. Though the spring and the garden attract lot of local tourist traffic generally, during holidays and weekends, the water bodies (i.e. Streams) have not been developed at all. As pointed out by W.R. Lawrence in the valley of Kashmir, Achabal is perhaps one of the few places which would survive singularly on its potent water bodies and streams. A very careful development of areas and houses along with these water bodies would positively turn Achabal into a beautiful little Venice in the centre of Anantnag districts.

As already stated the commercial activity of Achabal is practically negligible. This is attributed to the present pattern of the tourist mechanism. Added to this it may be remarked that the local

population has not in any way participated or benefited from tourism in the Kashmir valley in general and in Achabal in particular. Consequently settlements have not developed and grown.

Paradoxically the existing commercial area though more than adequate suffers heavily due to the existing pattern and mechanism of tourist traffic and to support the variety of needs of the local population and visitors a weekly market is held on Sundays and other holidays very close to the present commercial area and just in the vicinity of the present tourist area.

Our Surveys have yielded some paradoxical observations which may be summed up as follows:

The existing character of the conducted tours does not ensure utilization of the commercial area subsequent to which the commercial activity persistently remained undeveloped. This fallacy could be eradicated as a short term measure by extending the duration of the halt.

A fish breeding farm exists close to the Mugal garden and depends on the water from the spring. It is at present in a very derelict condition, though it is one of the two principal attractions for the tourists in Achabal. Planned and integrated development of the fish farm could stabilise the tourist activity apart from being a source for supplying fresh water fish.

Land Use

The notified area of Achabal measure about 797 acres. Apart from a small portion of area under residential and related uses major portion of the area is under agricultural use, Mugal garden and water streams etc. Most of the agricultural is under beautifully paddy fields.

Assessment of Requirements

The existing abadi areas are sufficient for the local population and can accommodate the natural growth in the subsequent areas.

Tourist Accommodation

Though Achabal holds the promise of being the major transport node by virtue of its central location it is envisaged that the character of tourist traffic will be principally of the transit type. Our preliminary estimate suggests that the tourist accommodation here needs to be increased. At present the tourist accommodation is available in the form of three huts and four rooms in the Dak bungalow. The study in respect of occupancy of the available accommodation has revealed that the demand for accommodation is low. However, with the development of the tourist spots like Verinag, Kokarnag, Daksum and extension of Pahalgam and also the development of Anantnag the demand for tourist accommodation is likely to increase. Achabal, however, shall continue to remain a transit centre. Accordingly it is felt that existing accommodation should be strengthened by the addition of a few rooms to tourist bungalow. With a view to bring in the private sector participation to the tourist activity a suitable arrangement wherein the local people can evolve a pattern to rent out furnished accommodation with essential amenities should be encouraged. Thus the private sector apart from satisfying the part demand of accommodation would improve its economy.

Recreation

Unlike Pahalgam which is activate during the day and dead at night Achabal is by and large inactive. Our preliminary estimates suggest that Achabal cannot sustain a cinema or a theatre or a swimming pool. It can provide only a selected set of opportunities to the tourists and these opportunities would have to be based principally on the unexplored and scenic water streams. There is a demand for certain picnic facilities on Sundays and weekdays. These facilities include those for cooking and eating places.

Bazar

The Bazar with 41 shops is adequate for the local population and tourists. However, the bazar does not offer the variety normally required by a habitation. This is further strengthened by our observation on the days when a large number of stalls spring up near the existing bazar.

Transportation

Geographically Achabal is an important transport node and important arterial roads converging here connect this place with other tourist spots in the eastern region. The facilities available here are, however, grossly inadequate. The nearest place where basic transportation facilities like filling stations and garages are available is Anantnag. Though now availability of these basic facilities is a common complaint of the tourist it is reckoned that it is specifically so in Achabal. There is no organized parking or a bus stand near the only tourist attraction which is the Mughal garden. The local tourists come by buses and tongas during the holidays and weekends and there is sizeable activities on these days. However, no tonga stand exist here. It is imperative to remark that tonga is still the most important mode of transport between Achabal and surrounding places.

Concept

Considering the constraints identified in the area analysis a careful surgery is needed in the existing settlement to organize them for the future requirements of settlement and tourism.

Tourist Areas

As identified earlier the garden, the area under fisheries and the numerous fresh water streams together with existing village form a multi-varied attraction for the tourist in keeping in view the surgical treatment required to develop this spot it is an essential that the existing should be developed in an integrated manner by opening out chunks of areas north of the garden and west of the road to Pahalgam. Accordingly the existing market north of the garden across the road should be extended eastwards along the stream. As already pointed out there is a considerable demand for weekly market giving a festive look and, therefore the extension to the existing bazaar should be integrated with the

weekly market to obtain the compactly inter-woven relationship between the market and the bazaar. This would necessitate certain lateral connections across the stream. The bus terminus should also be provided near or in the tourist area. This is accomplished on the north east side of the garden opposite to the existing Dak bungalow. When required a petrol and servicing station be provided in this area. This area should also be catered for parking needs.

The tourist accommodation should be increased in two ways:

- (i) By increasing the available accommodation in tourist bungalow and huts. This accommodation is envisaged in the form of single or double bed rooms and dormitories with a restaurant serving the Dak bungalow and its extension.
- (ii) By permitting the local people in certain specified areas to rent out accommodation to the tourists in the form of bed and breakfast at reasonable rates. There should be a strict enforcement of sanitary standards in such cases.

The water streams with their amazing potential for making Achabal a little Venice' should be developed in a manner such as to integrate the village and tourist areas.

DAKSUM

Daksum is a tourist spot in the corporate limits of village desu-nowhugh in the south eastern region of Kashmir. This tourist spot is densely forested and mountainous with fresh water streams defining the physical boundaries. Situated at 8082 feet above mean sea level Daksum is at present accessible by Mettaled road from Anantnag and Achabal via Koranag. This land was once (even today) the grazing grounds for the sheep and cattle owned by Gujjars. The Gujjar huts can still be spotted tucked in the natural landscape in this isolated area.

Considering the peaceful and Cool environment, forests, mountains, the fresh water streams, the fish and game- the area has tremendous potential for the future development for tourist industry if tourist infrastructure is provided and linkage improved.

Location

Daksum is located about 16 K.M. east of Kokarnag having direct link with Anantnag via Achabal and Brigni. The spot though very small is located at the confluence of two rivulets which form Bringi stream. Rich in its environmental character this spot is about ½ mile upstream. The Bringi stream from the village Desu Nowbug. The spot is at an elevation of about 200 ft. from the water level. The area forms a narrow Y'shaped valley.

Expanse and Boundaries

Daksum forms a part of the notified area of village Desu and is surrounded by Gogalmandu forest on north and east and Tsokur forest on south and Gungar forest on north-west. The Rivulet Soi Nar and Bringi stream isolate the tourist spot from the village Desu and the forest on the south and west. The tourist spot essentially envelopes Desu forest and Razparyin Maidan. This spot is essentially a conglomerate of a number of flat chunks of land with moderate slopes. The N.A. Measures 1450.2 acres.

Settlement

The tourist spot is relatively free of any structure except a few Gujar huts and The Rest house of the tourism and The Forest Departments as stated already the primary settlement is the village Desu.

Terrain

The tourist area is characterized by moderately sloping terrain along south west direction. The apex of the V formed by the two rivulets is almost in extension to the road from village Desu. The surrounding area is Mountainous with steep slopes.

Land Use

The area is free from any man made features of any meaningful intensity owing to the elevation of the spot and Non-availability of water for irrigation and the high altitude, There is little agricultural

activity in the area. A potatoes farm was envisaged to be developed by the agriculture department in the northern plateau.

Infrastructure

Except for water no other basic infrastructure exists at Daksum.

Potentials

The principal potential of Daksum is its unique environmental character. As stated already this spot is extremely quiet and peaceful. The topographical quality of the place is also unique, wherein structures of the type of Gujjar huts merge with the natural features. Water is another potent feature for development here. The two rivulets which define the north and south east boundaries of the area have a perennial flow. The forests surrounding the tourist spot have a wide variety of fauna which is another attracting feature for certain type of tourists interested in bird watching. There are numerous treks connecting the spot with interesting points in the area.

According to the Forest and Game departments substantial game is also available in the forest. Trout fish is another attractive feature of the spot. The moderately sloping large sized plateau (at the moment under potatoes farm) has tremendous potential for winter sports and recreation. This area is inhabited by Gujars. The Gujars still lead a very primitive life and possess a large number of live stock. Organized dairy farming should not only improve the general economy of the Gujjar but also ensure a regular supply of milk and milk products. A sheep breeding farm in accordance with the demand of the area has been started by the government near the village Desu.. Timber from forest is another aspect demanding attention and certain industry and trade based on timber has considerable potential in the area.

From the view point of landscape it may be remarked that a dense forests with Devdar, Kail fur and the backdrop of Mountains lend a soothing Grey atmosphere to the spot. The air is every fresh with Aroma of the Pine. This spot has strong sun in summer almost throughout the day. With the commissioning of

the Kishtwar Anantnag link this place will gain importance as it will lie on the transportation routes. Keeping all these potentials in view it is felt that Daksum has tremendous future for development if basic infrastructure is provided.

KOKERNAG

Kokernag is a beautiful tourist resort which has spring and offer unique scenic beauty and fresh water rich in minerals having creative effect . It is estimated that about 33% of the total tourist coming to Kashmir visited Kokernag in 1980 during April to November .out of these 9000 persons are estimated to have visited by cars and 3726 constituting about 2% of the total tourist traffic to Kashmir stayed at Kokernag during 1980 .There are scopes for further enhance traffic to this tourist resort and promote the period of stay and enhance number of tourists staying at Kokernag .

Location

Kokarnag is located 15 miles from Anantnag on way to Daksum. This place is famous for its digestive fresh water spring. Kokarnag notified area comprises of part of Bdder and Bindoo villages, lying east and west of the spring respectively. Kokarnag is merely a Tourist spot and does not appear as an entity in the census list of settlements.

Expanse And Boundaries

The spring lies at the foot of the Kokarnag forests which form the southern boundary of the notified area. Bindoo village and the west, Bidder village, The agricultural fields from the Kokarnag tourist notified area.

Settlements

Major part of Bindoo lies on south of Te road and The remaining portion in form of scattered bunch of settlements lie amidst the irrigated agricultural (nos tly paddy) fields on the north. There is no source

of water in the main Bindoo village. Bidder on the other hand is surrounded and cut by water streams. Bidder is essentially a village with linear development existing on both sides of the road.

Terrain

The area is open and undulated, stretching along the base of the Kokarnag forests and mountains. Though the area is limited in extent, The panoramic view, from certain points are unique by themselves. The area, in general, slopes down from Bindoo to Bidder and from the road towards the river in the north

Climate

Kokarnag is famous for its healthy climate than any other aspect that might attract a tourist. As a matter of fact many convalescents come here every year and stay for considerable duration.

Accommodation

The present tourist accommodation consists of a Dak Bungalow with bed rooms, huts, dormitory in the tourist office and A camping area for about tents apart from insignificant private accommodation there is a restaurant in the tourist office, a few "Dhabas" and some dining facility in the Dak Bungalow. The place is absolutely dead at night: Though it becomes a bit lively during the day when a few conducted buses touch Kokarnag for a few minutes. Few stalls are set up by the local people near the parking area for buses during the day.

VERINAG

Location

Verinag is located about 16km. south of Anantnag, and is about 2-1/2 km. from national highway linking Jammu with Srinagar. It has an altitude of 2100 meters above M.S.L. river Jehlum originates from the spring, popularly known as the Verinag spring.

Expanse and Boundaries

The total area of Verinag measures about 1451 acres and includes settlements of upper Verinag, Lower Verinag, Chontipora, Malikpora, Bungund, Kokagund-Kuni gund and Aralpora. On the northern side it is bounded by Sandaran river and on south and south east by forested mountains.

Development Potential

Verinag has potential for development as a transit centre due to its strategic location-(being near the national highway)The crystal clear blue water spring and the mughal gardens. In addition the very morphology of the area suggests that some beautiful spots could be developed keeping in view the existing situation. It is located about 16K.M. from Anantnag and is connected to national highway by a spur, but it attracts not many tourists due to the fact that not much of the accommodation is available for night halt and places of interest are limited. Major tourist traffic touching the place come by buses, halt at the place for just an hour or two and proceed to next destination. The local tourists visiting the place are negligible. This tourist place owes its meagre survival to the historic Verinag spring one of the many sources of river Jehlum. The settlement serves the adjoining areas for their commercial, educational and medical needs. Keeping in view these points this area could be well developed in an integrated manner to the benefit of the local population and tourists.

Verinag is beautiful tourist spot situated at the foot of PeerPanjal mountains in extreme south of Kashmir valley at the altitude of 180 to 1880 meters above M.S. L. The mughal laid out a small garden and a small canal in the center which is important feature of the mughal gardens. The dominant feature of the resort is the verinag spring which is fountain head of the river Jhelum and the adjoining hill which is covered by lush green dense forest tending grandeur to the garden and its surrounding area. It is situated hardly 3 km from national highway no 1-A connecting to Jammu to Srinagar. The tourist traffic to this area is adversely affected ever since the rail head at Jammu was established. Previous to this development two way bus service Pathankot to Srinagar would enable the tourist to visit this spot. One day bus service between Jammu and Srinagar and lack of conducted

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tours touching this southern most point of attraction has resulted in a decline of tourist trafficking to the place .The tourist infrastructure included a 4 bed DakBanglow and 6room in the form of huts

SANASAR

129 kms. From Jammu and only 19 kms. from Patnitop, Sanasar is a cup shaped meadow surrounded by gigantic conifers. A place for a quiet holiday, the meadow has now been developed as a golf course. It also provided opportunities for paragliding. Accommodation is available in huts, Tourist Bungalow and dormitory of the J&K Tourism Development Corporation.

MANSAR LAKE

8 kms. from Jammu A beautiful lake fringed by forest-covered hills. Boating facilities are available on the spot. Every year around Baisakhi, a food and crafts festival is organized here by J&K Tourism. Accommodation: Tourist Bungalow and huts of J&K TDC.

SURINSAR LAKE

42 kms. It is a picturesque spot with a lake surrounded by wooded hills. Accommodation is available in J&K TDC Bungalow.

SHIV KHORI

100 kms. This holy place, nearly a kilometer long with a 4-feet high naturally formed Shivling, is considered second only to the shrine of Vaisnodevi ji. A major festival is held here on Shivratri day.

JAJJAR KOTLI

35 kms. On the National highway leading towards Srinagar is the Jajjar Kotli Tourist Complex, built on the banks of the Jajjar rivulet. The crystal clear, cool water of Jajjar attract picnickers in large numbers during summer. A Tourist Cafeteria, a Bar and a small Tourist Bungalow are the facilities provided here by JKTDC.

BABA DHANSAR

6 kms. From Jammu, on way to Salal Dam, Baba Dhan sar is a beautiful and cool picnic spot. Here, a huge spring gushes out of the mountainside in a thick grove of trees and forms a number of small water-falls before flowing into the Holy Banganga. Next to the spring in a small grove in the rock face is a naturally formed Shivling on which droplets of water fall naturally all the year round. A big mela is held here during Shivratri.

ARU

It is a small beautiful valley surrounded by high mountains and located on Lidder stream about 13 km. from Pahalgam. The only infrastructure available at present is tourists hut. The place bears a scope for development as full-fledged tourist resort in its own right. In addition to places of tourist attraction, the streams in Anantnag District offer excellent opportunities for fishing to the select segment of tourists. The facilities offered in this respect are good and details have been given in the sector on fisheries in report.

POONCH

In 1947-48, Poonch town and most of the parts of the district were subject to attack from Pakistan and major facilities available like road links and bridge were damaged. Fortunately, because of the defense needs there is dependable road link between Jammu and Poonch (240 km.) This passes through Akhnoor, Sunderbani, Rajouri and across Bhimbar Gali into Poonch. There is a loop connection between Rajouri and Poonch through Thanamandi across Deragali. At all these important places, Dak Bangalows and guest house have been constructed. Regular and daily bus services operate between Jammu, Rajouri and Poonch. Taxi cars also ply between Jammu and these two district head quarters. Telephonic communications in this area is not upto the mark.

Poonch district has a number of beautiful valleys on the Peer Panchal range. These valleys are Buffliaz, Surankote, Manid and Mendhar. From Bhim bar gali and Darangli one gets beautiful and commanding view of snow covered Peer Panchal and its magnificent peaks. Roads from Poonch, Surankote and Mandi. Up the Peerpanchal go through not so high passes connecting them with the Kashmir valley. Work was taken in hand on Mandi-Loran road some years ago but the progress is slow and similar the work on the Mughal road form Buffliaz is also very slow. This district and Rajouri and also the area on route from Jammu has a number of places of tourist interest like Akhnoor which is a beautiful picnic spot, being on the banks of Chena b, and the place where coronation of Maharaja Gulab Singh took place; Chingus ruins of old fortes. Thanamandi which was seat of very important kingdom in the middle ages and has ruins of a major fort at top of the hill Thanamandi is also centre of major handicraft wool work in the area; Deragali has beautiful rest house facing the Peerpanchal; Noorichhamb picturesque water fall where Empress Noor Jahan used to camp for over a week every summer. The area also has a number of places of religious importance and pilgrimages like Shahdra Sharif, (in Rajouri) highly revered by Muslims; Nudda Amar nath, Shiva temple, only next in importance to Amarnath cave; and the famous Gurudawara of Nagali Shaib.

POTENTIAL TOURIST DESTINATIONS AND CENTRES

We are providing the potential locations and centers, which could be developed for tourism activities. We would like to mention that we might not have mentioned a number of vital potential tourist areas, it is not out of ignorance but because the consultants have felt it is more necessary to revive and enlarge the existing sites of tourist interest, develop an interdependence of the local population with the developmental activity and allow the absorption of the overflows of such economic activity to benefit the local population and only then consider moving in identified new areas. The consultants have realized that the increasing population pressure requires the local population to be first moved into areas which are rich in tourist potential and in their rehabilitation the infrastructure of new tourist and small trade activities would need to be incorporated. Opening new tourist sites in areas which are devoid of local population would make the tourism activity very expensive to sustain and it would not be still round the year activity. For example there is rich tourism potential in Zaskar and Padam valley but with no population to benefit. Putting up expensive infrastructures for visiting tourist for a period of maximum of three months in a year from the point of view of the consultants is bad investment.

The state government has no plans of relocating the local population in new identified areas which have rich tourist potential. The consultants have refrained from suggesting what were not viable schemes and which were suggested by local officials for possible incorporation in the consultants proposals.

Basis for Identification of Potential Tourist Locations

The Potential places have been mentioned in such a way that the tourist inflow which presently is mostly concentrated in few locations segregates/ bifurcates to other new potential locations near and around the major tourists hubs. This would help in development of the new areas and would reduce the excessive pressures on few locations in the tourist season. We have also identified locations which are virgin and have tremendous potential for attracting tourists.

We are also providing a list of under developed areas which needs to be developed as they are already having potential of attracting tourists.

Potential Tourist Locations

Region	Location	Type of Attraction
Kashmir	Gurej Valley	Scenic Beauty
	Dakshum Valley	Scenic Beauty
	Lolab Valley	Scenic Beauty
	Ahabal	Scenic Beauty
	Aharbal	Scenic Beauty
	Yusmarg	Scenic Beauty
	Woolar lake	Scenic Beauty
	Khir Bhavani	Religious location
	Kokarnag	Scenic Beauty
Jammu	Mansar lake	Scenic Beauty Lake
	Sanasar lake	Scenic Beauty Lake
	Mantalai	Scenic Beauty Dam
	Jhajar Kotli	Scenic Beauty Dam
	Surinsar lake	Scenic Beauty Lake
	Doda	Scenic Beauty good climate
	Udhampur	Scenic Beauty good climate
	Poonch	Scenic Beauty good climate
Ladakh	The Pangong lake circuit	Scenic beauty- Lake
	The Tso-Moriri lake circuit	Scenic Beauty Lake
	The Drok-Pa-Area circuit	Local communities culture and tradition
	Nubra valley circuit	Scenic beauty Mountain,Tracking

Region wise/District wise Less/Under Development areas		
(Kashmir Division)		
S.No.	Name of the area/spot.	Remarks/Status/
1	2	4
1	Tangmarg	A hill Station.Basic station of Gulmarg.Metalled road fromGulmarg.
2	Baba Reshi	A Muslim Pilgrim spot adjacent to Gulmarg.Connected with metalled road. All communities within and outside the state are visiting this shrine.
4	Manasbal	Metalled road/Srinagar/Hills/Boating/Lake.
5	Yusmarg	Metalled road/ need upgradation-Srinagar/Hill Station/Hills/Moderate temp..
6	Sonamarg	Metalled road -Srinagar/Hill station/Ladakh/Am amath/River/Rafting/ Trekking/Rock climbing/Glacier/Hills/Hotels.
7	Aharbal	Metalled road/Hill station/ Trekking base camp/Beautiful water fall
8	Verinag	Metalled road/Gigund.-Srinagar/Beautiful garden/Base of river Jehlum.,
9	Mattan	Metalled road/Pond/Hill station/Boating place to Amar nath ji Yatra.
10	Aru	Metalled road/Pahalgam/Hill station/Trekking area/Hotels/Tourist Bunglow.
11	Chandanwari	Metalled road Pahalgam/Hill station/River/Glacier/Hill station/Boating place of Amar Nath Ji Yatra
12	Gigund	A hill station on Jammu-Srinagar National Highway.Tabas/Tourist Bunglow
13	Daksum	Metalled road/Kokernag/Hill station/Tourist Bunglow/Hills/Sheep form.
14	Ahabal	Metalled road Anantnag-Mugal Garden/
15	Kokernag	Metalled road /Srinagar/Hill station/Gardens/Spring
16	Aishmuqam	Metalled road Anantnag/Muslim Shrine
17	Charari Sharief	Metalled road/Srinagar/Muslim Shrine.
18	Ganderbal	Metalled road/Srinagar/Camping place.
19	Kangan	Metalled road/Srinagar/Power Station/Hotels-on way to sonmarg.
20	Gund	Metalled road/Srinagar/on way to Sonmarg.
21	Baltal	Metalled road/Srinagar/Leh/Basic camp of Amarnath.Ji Yatra/River Camping sites.
22	Lolab Valley	
23	Gurez/Tilel Valley	

24	Tangdar	Kupwara	
25	Shikargah (Tral)	Pulwama	
26	Laherwan		
27	Kullan	Srinagar	
28	Naranag	Budgam	
29	Wangat	Srinagar	
30	Kungwattan	Pulwama	
31	Khag	Budgam	
32	Drangyari	Kupwara	
	Jammu Division		
1	Udhampur	Kathua	Metalled road Jammu/Srinagar/hotels/District headquarter
2	Basohli	Kathua	Metalled road/Jammu/Dam/Dak Bunglowold foto.
3	Sukhraladevi Ji	Kathua	Metalled road/Jammu/Hindu Shrine/Sarai
4	Ujj Barage	Kathua	Metalled road/Parks
5	Samba	Kathua	A station on Pathankot-Jammu National Highway.
6	Mansar	Kathua	Metalled road/Jammu/Udhampur/Hill resort/Lake/hotels/Tourist Bunglow/Sarai Boating
7	Surinsar	Kathua	Metalled road Jammu/Lake
8	Baba Jitto	Udhampur	
9	Nandini	Udhampur	Metalled road Jammu-Sgr. National Highway.Tabas/
10	Jajjar kothi	Udhampur	Metalled road.Picnic spot on Jammu-Sgr NW.
11	Chenani	Udhampur	Place on Jammu-Sgr NW-Power station/old fort
12	Kud	Udhampur	Hill station on Jmu- Sgr NW/hotels/Dak Bunglow/hotels
13	Batote	Doda	Hill place on Jmu-Sgr NW/hotels/hotels/Tourist Bunglow
14	Ramban	Doda	-do
15	Banihal	Doda	-do-
16	Sanasar	Udhampur	Metalled road Patnitop/ Hill resort/hotels/hotels/Tourist Bunglow.
17	Patnitop	Udhampur	Metalled road/Jammu/Hill Station/hotels/hotels/Tourist Bunglow
18	Sudhmahadev	Udhampur	Metalled road/Jammu/Hill station/hindu temple

19	Mantalai	Udhampur	Metalled road/III stationBram charies assets.
20	Panchari	Udhampur	
21	Dera Baba Bandha	Udhampur	Metalled road/Jammu-Katra/Sikh shrine/park
22	Thapol	Udhampur	
23	Baderwah	Doda	Metalled road/Batote/III station/IIIs/IIIs/River
24	Kishtwar	Doda	Metalled road/Batote/III station/IIIs/IIIs/ River/Trekking place
25	Thana mandi	Rajouri	
26	Dera-ki-Gali	Rajouri	Metalled road/Jammu/III station/IIIs/
27	Sunderbani	Rajouri	
28	Surankot	Poonch	
29	Shahdra Sharief	Rajouri	Metalled road/Rajouri/III station/Muslim Shrine visited by all communities.
30	Budhal	Kathua	
31	Chingus	Rajouri	Metalled road/Jammu/Forte
32	Noorichamb	Poonch	
33	Bufflias	Poonch	
34	Dhaggar	Poonch	
Developed Areas of Kashmir Division and Jammu Division.			
1	Pahalgam	Anantnag	Metalled road/Srinagar/III station/Rivers/IIIs s/IIIs/Dak Bungalow/ Camping sites/Golf Course/
2	Gulmarg	Baramulla	do
3	Srinagar proper	Srinagar	III station/Lakes/ River/IIIs/IIIs/Shrines/Monouments/Temples/ Gurdwaras/Churches/Golf course of international Standard
4	Jammu City	Jammu	City of temples/Shrines/Gurdwaras/IIIs/Rail head of state/IIIs/ Golf course/Rivers
5	Katra proper	Udhampur	Metalled road/Jammu/Udhampur/Base station of veshnodeviji.IIIs/ IIIs/Tourist Bungalow

New areas for 20 years perspective plan			
	Jammu Region/Kashmir Region.		Nearet Tourist Location
1	Baba Dhansar	Udhampur	Kud-Udhampur
2	Nav Durga	Udhampur	Kud-Udhampur
3	Jalaida Mata	Udhampur	Kud-Udhampur
4	Dera Baba Bandha	Udhampur	Katra
5	Panchari	Udhampur	Kud-Udhampur
6	Saroli Dhan		
7	Tibba		
8	Poonch Noda		
9	Qla Garh		
10	Manwa Mata		
11	Qla Daut		
12	Gop Suadi Bawli		
13	Nanga Thub Badal)		
14	Sheber Mard.		
15	Droodi Mard		
16	Mathian		
17	Marwah (Wadwan)	Doda	Kishtwar
18	Sarthal	Doda	Kishtwar
19	Devigol	Doda	Kishtwar
20	Kounserbal(Kulgam area		
21	Kandhi pathri	Budgam	Srinagar
22	Nagwar.		Srinagar
23	Bohasian Deji		
24	Gouriwan		
25	Chandossa		
26	Sarolidhar		
27	Pangan Devi		
28	Jungal Gali		
29	Mama De Dabbar (also called Mini Gulmarg of Jammu)	Udhampur	Udhampur
30	Tikermarg		
31	Kharimarg		
32	Chesnimarg	Rajouri &	Rajouri
33	Jangwealimarg	Poonch	
34	Doodh Wali Marg		
35	Lakes, Nandsar, hndoseerSekhseer & Neelseer	Sourrounding of these margs in Poonch & Rajouri.	Rajouri
36	Sandous Pahalgam area	Anantnag	Pahalgam
37	Sonawaro	Baramulla	

38	Nishat	Baramulla	Gulmarg
39	Basholi	Kathua	Lakhanpur
40	Bani	Kathua	Lakhanpur
41	Thein Dam	Kathua	Lakhanpur
42	Dharmahanpur	Kathua	Lakhanpur
43	Tarminyillage Marta	Ramnagar	Jammu
44	AbatGund Cave	Pahalgam	Pahalgam
45	Lal Draman	Doda	Doda
46	Dal Draman	Doda	Doda
47	Padri	Bhaderwah	Batote
48	Anga	Bhaderwah	Batote
49	Kailash	Bhaderwah	Batote
50	Blessa	Bhaderwah	Batote
51	Du-Nadi	Bhaderwah	Batote
52	Kahara	Bhaderwah	Batote
53	Bhattas	Bhaderwah	Batote
54	Gandoh	Bhaderwah	Batote
55	Changa and Kilotran	Bhaderwah	Batote
56	Bunjwah	Kishtwar	Batote
57	Banoon	Kishtwar	Batote
58	Nagsen	Kishtwar	Batote
59	Duchan	Kishtwar	Batote
60	Wardwan Valley	Kishtwar	Batote
61	Mugal Maidan	Kishtwar	Batote
62	Bhandar Kot	Kishtwar	Batote
63	Sarthal	Kishtwar	Batote
64	Paddar	Kishtwar	Batote
65	Kuntwara	Kishtwar	Batote
66	Shiv Parwati Cave	Panchari	Udhampur
67	Kapran	Anantnag	Achabal-Verinag
68	Dhar	Katra	Katra
69	Bomagh	Reasi	Katra
70	Sundri Bala Kot	Billawar	Lakhanpur
71	Se-Gala	Udhampur	Udhampur
72	Bursw	Udhampur	Udhampur
73	Devak	Udhampur	Udhampur
74	Tatapani Gool	Doda	Batote
75	Sangal Dhan	Doda	Batote
76	Gool	Doda	Batote
77	Bangus	Baramullah	Gulmarg
78	Dragyari	Baramullah	Gulmarg
79	Panzigam	Baramullah	Gulmarg
80	Lolab	Baramullah	Gulmarg

81	Sogam	Baramullah	Gulmarg
82	Chandigam	Baramullah	Gulmarg
83	Daroosa	Baramullah	Gulmarg
84	Andurbug	Baramullah	Gulmarg
85	Devar	Baramullah	Gulmarg
86	Lalpura	Baramullah	Gulmarg
87	Dardpora	Baramullah	Gulmarg
88	Kursen	Baramullah	Gulmarg
89	Vavora	Baramullah	Gulmarg
90	Putshai	Baramullah	Gulmarg
91	Kurhamma	Baramullah	Gulmarg
92	Athwato	Bandipora	Gulmarg
93	Sundarwani	Bandipora	Gulmarg
94	Watlab	Bandipora	Gulmarg
95	Shira sar	Bandipora	Gulmarg
96	Khundasar	Bandipora	Gulmarg
97	Amukh	Bandipora	Gulmarg
98	Dhamthangupha	Bandipora	Gulmarg

SERVICES AND INFRASTRUCTURE ALREADY AVAILABLE

**LIST OF DEPARTMENTS CONCERNED DIRECTLY OR INDIRECTLY FOR
DEVELOPMENT OF TOURISM**

S.No	Name of department
1	Tourism department Government of J&k
2	Gardens, Parks & Floriculture Department Government of J&K
3	Lakes and Water Development Authority J&K
4	JKTDC
5	Power Development Department Government of J&K
6	Road & Bridges Department Government of J&K
7	Archaeological Department Government of J&K
8	Archaeological Survey of India
9	Department of Forest Government of J&K
10	Department of Wild life Government of J&K
11	Department of Fisheries Government of J&K

AVAILABLE PROMINENT TOURIST RESORTS

Jammu and Kashmir has various tourist resorts. The prominent ones are

- a. Gulmarg
- b. Pahalgam
- c. Kokernag
- d. Daksum
- e. Achabal
- f. Aharbal
- g. Sonmarg
- h. Yousmarg
- i. Patnitop
- j. Sanasar
- k. Mansar
- l. Surinsar
- m. Kud
- n. Sarthal
- o. Bhadarwah & Kishtwar
- p. Loran
- q. Leh (entire region)
- r. Kargil (entire region)
- s. Zanskar (entire region)

SERVICES AND INFRASTRUCTURE ALREADY AVAILABLE

NUMBER OF HOTELS IN KARGIL TOWN

S.NO	Hotels	No. of bed available	No of accommodation
1	A' Class Hotels	109	4
2	B' Class Hotels	44	2
3	Economy Class	26	3

NUMBER OF REGISTERED HOTELS AT DRASS (KARGIL)

S.NO	Hotels	No. of bed available	No of accommodation
1	B' Class	21	2
2	Economy Class	2	1

NUMBER OF REGISTERED HOTELS IN PADUM (ZANSKAR)

S.NO	Hotels	No. of bed available	No of accommodation
1	B'Class	6	1
2	Economy Class	13	3

NUMBER OF REGISTERED HOTELS IN LEH

S.NO	Hotels	No. of bed available	No of accommodation
1	A'Class	732	32
2	B'Class	281	20
3	C'Class	155	14
4	D'Class	72	7

NUMBER OF REGISTERED GUEST HOUSES IN LEH

S.NO	Hotels	No. of bed available	No of accommodation
1	Upper Class	218	14
2	Medium Class	153	12
3	Economy Class	870	80

JAMMU REGION

NUMBER OF HOTELS IN JAMMU

S.NO	Hotels	No of accommodation
1	A'Classs	6
2	B'Class	23
3	C'Class	102

HOTEL / LODGES BED CAPACITY

ABSTRACT CATAGORIWISE

ENDING DECEMBER. 1991

JAMMU

S.NO	Category	No. of facilities	Bed capacity
1	A	3	211
2	B	15	713
3	C	29	940
4	Lodge	79	1495
5	TRC, Jammu		256
		Total	3615

KATRA TOWN

S.NO	Category	No. of facilities	Bed capacity
1	A	3	267
2	B	1	60
3	C	1	66
4	Lodges/Guest Houses	39	5045
5	JKTDC		332
6	Shrine Board		604
		Total	6374

AUDHKWARI

S.NO	Category	No. of facilities	Bed capacity
1	Shrine Board		760
		Total	760

DARBAR VAISHNODEVIJI

S.NO	Category	No. of facilities	Bed capacity
1	Shrine Board		3700
		Total	3700

JHAJJARKOTLI

S.NO	Category	No. of facilities	Bed capacity
1	JKTDC		10
		Total	10

REASI CITY

S.NO	Category	No. of facilities	Bed capacity
1	PWD		16
2	Guest Houses / Hostels		218
		Total	234

UDHAMPUR CITY

S.NO	Category	No. of facilities	Bed capacity
1	B	1	40
2	PWD		20
3	Lodges / Guest Houses		1442
		Total	1502

KUD

S.NO	Category	No. of facilities	Bed capacity
1	JKTDC		96
2	Hotel / Lodges		46
		Total	142

SUDHMAHADEV

S.NO	Category	No. of facilities	Bed capacity
1	JKTDC		44
		Total	44

PATNITOP

S.NO	Category	No. of facilities	Bed capacity
1	B	1	44
2	C	1	28
3	JKTDC		80
4	Tourism Deptt.		08
5	Youth Hostel		40
		Total	200

SANSAR

S.NO	Category	No. of facilities	Bed capacity
1	JKTDC		20
2	Tourism Deptt.		04
		Total	24

BATOTE

S.NO	Category	No. of facilities	Bed capacity
1	C	1	29
2	JKTDC		60
3	Lodges	4	82
		Total	171

RAMBAN

S.NO	Category	No. of facilities	Bed capacity
1	C	1	28
2	JKTDC		22
3	Lodges	4	79
		Total	129

DODA CITY

S.NO	Category	No. of facilities	Bed capacity
1	C	1	26
2	Lodges	3	49
		Total	75

BHABARWAH

S.NO	Category	No. of facilities	Bed capacity
1	C	3	86
2	Lodges	5	26
		Total	112

KISHTWAR

S.NO	Category	No. of facilities	Bed capacity
1	Tourist Complex		100
2	Lodges	9	263
		Total	363

POONCH

S.NO	Category	No. of facilities	Bed capacity
1	C	1	16
		Total	16

MANSAR

S.NO	Category	No. of facilities	Bed capacity
2	JKTDC		24
		Total	24

SURINSAR

S.NO	Category	No. of facilities	Bed capacity
1	JKTDC		10
		Total	10

SUKHRALADEVI

S.NO	Category	No. of facilities	Bed capacity
2	JKTDC		80
		Total	80

Source: Directorate of Tourism, Jammu.

ACCOMMODATION FACILITY IN KASHMIR REGION

S.N o.	Units	Srinagar		Sonamarg		Anantnag		Aharbal		Pahalgam		Gulmarg		Total	
		No.	Bed capacity	No.	Bed capacity	No.	Bed capacity	No.	Bed capacity	No.	Bed capacity	No.	Bed capacity	No. of Hotels categories	Bed capacity
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
	HOTELS														
1	5 Star	3	857	-	-	-	-	-	-	1	156	-	-	4	1013
2	3 Star	3 *	65	-	-	-	-	-	-	1	100	1	78	5	786
3	2 Star	9	1034	-	-	-	-	-	-	-	-	-	26	10	106
4	A Class	25	1853	1	26	1	39	-	-	2	192	-	-	29	2110
5	B Class	46	2370	-	-	-	-	-	-	6	453	14	414	6	3239
6	C Class	57	2330	-	-	1	24	1	25	22	3195	1	10	82	5585
7	D Class	12	46	-	-	-	-	-	-	9	288	-	-	21	751
8	E Class	15	413	-	-	-	-	-	-	3	80	-	-	18	493
9	Guest buses.	96	2172	-	-	-	-	-	-	16	250	-	-	112	2422
	TOTAL	26	12102	1	26	2	6	1	25	6	4715	17	526	347	17459
	HOUSE BOATS.														
1	Deluxe	324	1878												
2	A Class	137	45												
3	B Class	124	590												
4	C Class	127	574												
5	D Class	377	160												

SANTEK CONSULTANTS PVT. LTD.
NEW DELHI

TOURIST INFRASTRUCTURE EXISTING IN J&K

TRAVEL AGENTS IN LEH

Number of Travel Agents : 113

TRAVEL AGENTS IN KARGIL

Number of Travel Agents : 5

NUMBER OF REGISTERED UNITS IN KASHMIR REGION

S.NO	NAME OF THE UNIT	SRINAGAR/ACHAB AL/	PAHALGAM	GULMARG	SONMARG	TOTAL
i)	DEALERS / BOOT HIRES,SHOP ETC	116		15	8	199
ii)	JUNIORS SKGUIDES			12		12
iii)	RESTAURANTS / DWBAS	98	16	47	38	199
iv)	GUIDES	27	-	53	-	81
v)	PHOTOGRAPERS/HWKERS	250	36	50	5	341
vi)			-	-	-	
vii)	CAMPING AGENCIES		-	-	-	10
viii)	TAXI SHKARAS (Srinagar / Manasbal)	186		-	-	186
ix)	BATHING BOATS	9	-	-	-	9
x)	MOTOR BOATS	72	-	-	-	72
xi)	COOLIES / POTERS	22	35	36	15	108
xii)	DEALERS / BOATIRE SHPS		-	-	-	450
	TRAVEL AGENCIES / EXCURSION AGENTS	185	7	-	-	192
xiii)	PHOTOGRAPERS					
xiv)	PONIES (ANRBAL/YUSMARG)	114 +133 =247	2000	935	1527	4709
xv)	SLEDGEWALLAS			358	318	66
xvi)	DANDIWALLAS				49	49

Name of the area where the tourist units were approved for construction of Hotels, Huts, Tenting colony and expansion of existing units under Incentive Rules, 1995.						
S.No	Name of the Area	Construction of Hotels colony	Construction of huts/tenting of Hotels colony	Expansion of existing units	Paying guest Houses	Total
1	2	3	4	5	6	7
	KASHMIR DIVISION					
1	Lower Munda Qzigund	01	-	-	-	01
	JAMMU DIVISION					
1	Patnitop	03	3	3	-	03
2	Katra	03	-	-	-	03
3	Kud	01	-	-	-	01
4	Bani	-	-	01	01	01
5	Kishtwar	-	-	01	-	01
6	Sukharaladevi Ji	01	-	-	-	01
		08	01	02	01	10

Area wise number of units approved under incentive rules 1995 for creation of Tourist accommodation/facilities.						
S.No	Name of area	Paying guest house	Hotels	Huts/tenting accommodation/resort	Expansion of existing unit	Total
	LADAKH					
1	Stok	9	1	1	-	11
2	Sakara	-	-	-	1	1
3	Shey	4	-	-	-	4
4	Zangtsi	-	1	-	-	1
5	Nubra Valley	16	1	1	-	18
6	Leh	-	3	1	2	6
7	Lukung	1	-	-	-	1
8	Likir	1	-	-	-	1
9	Thiksay	6	-	-	-	6
10	Lamayuru	2	-	-	-	2
11	Choglamsar	-	1	-	-	1
12	Dah Hoo area	1	-	-	-	1
13	Matho	-	-	1	-	1
14	Chanspa Leh	-	1	-	-	1
15	Upper Karzu	-	1	-	-	1
16	Khalsi	1	-	-	-	1
17	Yuruthang Leh	-	-	-	1	1
18	Hzay Leh	-	-	-	1	1
19	Shenam Leh	-	-	1	-	1
20	Zanskar Kargil	5	-	-	-	5
21	Mulbeck Kargil.	-	-	-	-	-
	TOTAL	46	9	5	5	66

Chapter- XIX Services Infrastructure Already Available

20 Year Perspective Plan for Sustainable Development of Tourism in the State of Jammu And Kashmir

**ROAD TRANSPORT
PUBLIC AND PRIVATE TRANSPORT FLEET**

S.No	Kinds of Vehicle	31.3.71	31.3.75	31.3.80	31.3.85	31.3.90	31.3.91	31.3.94	31.3.95	31.3.96	31.3.97	31.3.98	31.3.99	31.3.00
1	2 Buses/Mini buses	3	4	5	6	7	8	9	10	11	12	13	14	15
		813	1505	2410	5047	8245	9044	10403	10904	11769	12623	13588	14444	15583
2	Taxies	489	1221	2129	2779	4447	4458	4486	4494	4527	4586	4633	5701	6623
3	Private Cars/St. Wagons	1828	3276	4411	7641	14570	15801	20256	21940	24050	27377	30914	36067	43030
	Total	3130	6002	8950	15467	27262	29303	35145	37338	44586	56212	65236		

Excluding figures in respect of Leh J&K and Kargil for the year 1999-00

Source : Director General Transport ,

WATER TRANSPORT

EXISTING WATER TRANSPORT	
mode of transport	No. of transport
Busboat	870
Passenger boats	1000
Luggage boats	550
Fishing boats	85
Passenger dongas	150
Taxi shikaras	1700

ROAD INFRASTRUCTURE

**Category wise road length maintained by state PWD excluding
National Highway as on 31.3.2000 (Provisional)**

S.NO	District	Road length (kms)					Total
		Black topped	Metalled	Shingled	Fair Weather	Jeepable	
1	2	3	4	5	6	7	8
1	Anantang	596	249	378	41	64	1328
2	Pulwama	455	378	42	3	-	878
3	Srinagar	1002	316	68	19	20	1425
4	Budgam	436	296	377	13	-	1122
5	Baramulla	576	568	303	89	17	1553
6	Kupwara	258	315	137	91	21	822
7	Leh	183	42	191	709	39	1164
8	Kargil	120	192	88	240	36	676
9	Jammu	1507	32	53	127	10	1729
10	Udhampur	373	95	62	189	-	719
11	Doda	162	190	40	217	4	613
12	Kathua	545	61	64	110	2	782
13	Rajouri	164	47	137	163	-	511
14	Poonch	104	7	51	53	2	217
	State	6481	2788	1991	2064	215	13539

Source : Public Works Department

EXISTING AIRPORTS IN JAMMU & KASHMIR

Existing Airport
Srinagar
Jammu
Leh

**Surfaced and Un-Surfaced length of roads maintained by various Departments
(Road length in District(Kms.) Table-(i))**

Department	Reference Year	Anantnag	Pulwama	Srinagar	Budgam	Baramulla	Kupwara	Leh	Kargil	Total KMR .Province
1	2	3	4	5	6	7	8	9	10	11
1. Forest Department:										
a) Surfaced	March 2000	4	-	11	-	3	4	-	-	19
b)Un-Surfaced		507	243	237	172	1019	473	-	-	2651
Total		511	243	248	172	1022	474	-	-	2670
2. Irrigation and flood control :										
a) Surfaced	March 2000	29	20	22	17	45	Neg	-	-	133
b) Un-Surfaced		14	56	43	20	131	25	-	-	289
Total		43	76	65	37	176	25	-	-	422
3. Border Roads Organization :										
a) Surfaced	March 2000	19	76	98	-	314	189	NA	NA	696
b) Un-surfaced		76	-	36	-	130	46	NA	NA	288
Total		95	76	134	-	444	235	NA	NA	984
4. C.D. & N. E. S. Dept.										
a) Surfaced	March 2000	395	377	58	211	367	225	-	-	1633
b) Un-surfaced		157	43	188	133	211	110	-	-	842
Total		552	420	246	344	578	335	-	-	2475

**Surfaced and Un-Surfaced length of roads maintained by various Departments
(Road length in District(Kms.) Table-(ii)**

Department	Reference Year	Jammu	Udhampur	Kathua	Doda	Rajouri	Poonch	Total Jammu	Total State
1	2	12	13	14	15	16	17	18	19
1. Forest Department:									
a) Surfaced	March 2000	6	36	1	2	1	-	46	65
b) Un-Surfaced		232	1762	1117	3510	325	133	7079	9730
Total		238	1798	1118	3512	326	133	7125	9795
2. Irrigation and flood control :									
a) Surfaced	March 2000	3	-	3	-	1	-	7	140
b) Un-Surfaced		197	-	49	-	27	-	273	563
Total		200	-	52	-	28	-	280	702
3. Border Roads Organization :									
a) Surfaced	March 2000	420	332	277	283	613	333	2258	2954
b) Un-surfaced		13	143	12	193	81	31	473	761
Total		433	475	289	476	694	364	2731	3715
4. C.D. & N. E. S. Dept.									
a) Surfaced	March 2000	42	38	39	-	2	5	126	1759
b) Un-surfaced		328	170	337	1557	408	192	2992	3834
Total		370	208	376	1557	410	197	3118	5593

P : Provisional

Neg : Negligible

NA : Not Available

Source :- Concerned Departments

**POWER SECTOR
POWER AVAILABILITY POTENTIAL AND FUTURE PLAN**

WINTER AVAILABILITY AND DEMAND OF POWER

Year	Winter availability (MW)	Demands
2002-2003	726.70	1525
2003-2004	862.70	1615
2004-2005	1023.70	1706
2005-2006	1133.70	1815
2006-2007	1133.70	1925

STATEMENT OF ENERGY AND POWER DEMANDS VERSUS SUPPLY POSITION IN J&K STATE

S.NO.	YEAR	PEAK POWER/ENERGY REQUIREMENT		SUPPLY POSITION (E)	
		ENERGY MUS	POWER MWS	ENERGY MUS	POWER MWS
1	2001-2002	6796	1437	5132	920
2	2006-2007	9099	1923	6663	1493
3	2011-2012	12125	2563	10433	2000
4	2016-2017	16081	3399	16081	2530

HYDEL POTENTIAL IN JAMMU AND KASHMIR STATE

S.NO.	BASIN	POTENTIAL
1	JHELUM	3576.55
2	CHENAB	10375.00
3	INDUS	2066.81
4	RAVI	225.00
	TOTAL	16243.36

EXISTING ATTRIBUTES OF JAMMU & KASHMIR

NATURAL RESOURCES: NATIONAL PARKS /SANCTUARIES/ BIOSPHERE RESERVE

NATIONAL PARKS/ SANCTUARIES/ BIOSPHERE RESERVE	ATTRACTIONS
Dahingam National Park	<p>Flora: There are over fifty species of trees, twenty of shrubs and five hundred species of herbs.</p> <p>Fauna: There are twenty mammal species, which include hangul, Himalayan brown bear, Himalayan black bear, langur, Himalayan marmot, leopard etc.</p> <p>Avifauna: There are over 150 species of birds.</p>
Kishtwar High Altitude National Park	<p>Flora: The area is characterized by marked variations in topography, climate and altitude, as result of which different types of forest vegetation occur. The major herbs include Primula spp., Brachypodium spp., Anemone spp., Dipsacus mitis, Artemisia vulgaris, etc.</p> <p>Fauna: There are over fifteen mammal species: the principal species being, hangul, musk deer markhor, goral, Himalayan black bear, Himalayan brown bear, langur, leopard, etc.</p> <p>Avifauna: Fifty species of birds exist here and the main species are the Himalayan Jungle crow, griffon vulture, bearded vulture, golden eagle, monal, koklas, golden oriole, paradise flycatcher, white checked bulbul, Indian mynah, etc.</p>
Hemis High Altitude National Park	<p>Flora: The area is barren and rocky and covered only sparsely. The natural, woody vegetation includes Lonicera spp., Rosa webbiana, Caragana pygmaea, Myricaria germanica, Ephedera Gerardiana (when the herbaceous ground cover is in assemblage) Taraxacum officinale, Eriogonum pinnatum, Stipa barbata, Urtica spp., Artemisia spp., Rheum spiciforme, Polygonum sibiricum, etc.</p> <p>Fauna: The Park is endowed with over ten mammal species most of which are rare and endangered. The major species are shapu, bharal, Ovis ammon (the great Tibetan sheep) ibex, Himalayan marmot, snow leopard, etc.</p> <p>Avifauna: This area has a rich and varied bird life; the principal species being chukar, Himalayan snow cock, magpie, Himalayan whistling thrush, red-billed chough, yellow-billed chough, etc.</p>

NATIONAL PARKS/ SANCTUARIES/ BIOSPHERE RESERVE	ATTRACTIONS
Surinsar Mansar (Patwar) Wildlife Sanctuary :	<p>Flora :The mixed scrub forest comprises mainly of broad-leaved species which are mixed with stands of Pinus gerardiana. The common broad-leaved species are Acacia spp. Mallotus phillipensis, Dalbergia sissoo, Ficus bengalensis, Ficus religiosa, Bauhinia variegata, etc.</p> <p>Fauna :The area supports a rich population of wild mammals which number upto eight species; the main species being goral, wild boar, barking deer, leopard, etc.</p> <p>Avifauna :The area is refuge to a multitude of birds including the black partridge, red jungle fowl, peafowl, grey partridge, green pigeon, blue rock pigeon, rufous turtle dove, etc.</p>
Jasrota Wildlife Sanctuary	<p>Flora :Though dominated by bamboo plantations, the other broad-leaved associates here are Acacia catechu. Dalbergia sissoo, Lannea grandis, etc. The main shrubs are Lantana camara, Carissa spinarum, Dodonea viscosa, etc.</p> <p>Fauna: The area still houses an appreciable number of animal life, the most prolific being cheetal, barking deer, wild boar, rhesus monkey, etc.</p> <p>Avifauna :The area harbours a rich variety of pheasants apart from the other migratory and resident birds. The principal species are peafowl, red jungle fowl, jungle bustard, green pigeon, blue rock pigeon, etc,</p>
Overa-Aru Biosphere Reserve :	<p>Flora :The area holds a rich cover of vegetation, the dominant forest consisting of conifers which account for over 90%</p> <p>Fauna :Nature has gifted this Biosphere Reserve with multiple species of rare, endangered and protected species. The main species are hangul, musk deer, serow, brown bear, leopard, rhesus macaque, grey langur, Himalayan mouse hare, etc.</p> <p>Avifauna :The area houses a good population of pheasants and upland birds apart from other species, both resident and migratory.</p>

NATIONAL PARKS/ SANCTUARIES/ BIOSPHERE RESERVE	ATTRACTIONS
Ramnagar Wildlife Sanctuary	<p>Flora: The area is covered with dense mixed scrub forest with <i>Accacia modesta</i> as the predominant species. <i>A. arabica</i>, <i>A. catachu</i>, <i>Aegle marmelos</i>, <i>Accacia fistuala</i> include some other floral species of the area.</p> <p>Fauna : The key mammal species of Ramnagar sanctuary include wildboar, Chinkara, Barking deer, Neelgai, Jackal; Jungle Cat and Rhesus monkey in addition to leopards, cheetals, in deer park. Ducks peafowl</p> <p>Avifauna : The Sanctuary support a variety of bird species. They include Kalij pheasant, Red jungle fowl, Peafowl, Bee-eaters, Bulbuts, Golden oriole and sunbirds.</p>
Nandi Wildlife Sanctuary	<p>Flora : The floristic composition of the sanctuary is quite rich & diverse. The forests along the upper reaches comprise of blue pine. The lower hills are covered with broad leaved species including <i>Acacia catachu</i>, <i>Acacia modesta</i>, <i>Delbergia sisoo</i>, <i>Bombex ceiba</i>, <i>Aegle marmelos</i> etc. The under story comprises of <i>Cassia fistula</i>, <i>Bauhemia</i> species with grasses and herbs as ground layer.</p> <p>Fauna : Eight mammal species have been reported from the area. They include leopard, Wildboar, barking deer, goral rhesus monkey. Gray langure and porcupine.</p> <p>Avifauna : The avifauna of the area is very rich. Peafowl, Red jungle fowl, Chukor, are few to name.</p>
Gulmarg Biosphere Reserve:	<p>Flora : The area's vegetation constitutes more than 90% conifers.</p> <p>Fauna : Himalayan musk deer, apart from other rare and protected species like the leopard, brown bear, black bear, red fox, etc.</p> <p>Avifauna ; Pheasants and upland birds apart from other migratory and resident birds. The principal species being koklas, monal, Himalayan snow cock, bearded vulture, griffon vulture, chukar, Kashmir roller, European hoopoe, golden oriole, etc.</p>

LAKES

Lake of Jammu and Kashmir	Location
Dal Lake	Srinagar
Nagin Lake	Srinagar
Wular Lake	Srinagar
Anchar Lake	Srinagar
Manasbal Lake	Srinagar
Alpathar Lake	Gulmarg
Vishansar Lake	Sonmarg
Kishansar Lake	Sonmarg
Gadsar Lake	Sonmarg
Satsar Lake	Sonmarg
Gangabal Lake	Sonmarg
Tarsar Lake	Pahalgam
Tulian Lake	Pahalgam
Sheshnag Lake	Pahalgam
Surinsar Lake	Jammu
Mansar Lake	Jammu
Pangong-Tso,	Leh
The Tso-moriri Lake	Leh
Startsapuk- Tso (Fresh water)Lake	Leh
Tso-Kar(Salt water)Lake	Leh

GLACIERS

Thajiwas Glacier	Sonmarg
Kolahol Glacier	Pahalgam
Drang-Drung Glacier	Leh
Shafat Glacier	Leh
Spangmik Glacier	Leh
Parkachik Glacier	Leh

TROUT FISHES

Rivers / Ponds for Trout Fishes	Region
Badora nala or river.	Jammu Region
Budhal nala Rajorie	Jammu Region
Jai river Badrwa/Doda	Jammu Region
Bani,Kathua,	Jammu Region
Ans river Rajorie or punch	Jammu Region
Baflez nala punch	Jammu Region
Loran in punch.	Jammu Region
Arizal in Badgam	Kashmir Region
Birwa pond	Kashmir Region
River tral area in Anant nag	Kashmir Region
Shopion area in phulwama	Kashmir Region
Uri sector	Kashmir Region
Machal area	Kashmir Region
Lidder River	Kashmir Region
Bringhi	Kashmir

ADVENTURE SPORTS: JAMMU & KASHMIR

Trekking:

A range of trekking options is available in the Jammu area. Ask for a free copy of our trekking brochure for a detailed description of the many short and long treks you can take. Summer is the season when all the routes are open but some trekking routes are open in winter. There are excellent camping sites in the wilderness where you can camp when you are trekking for 2-3 days. The Sudarani-Jungal Gali- Jasar Kote-Sanasar route in the jungal gali area lets you choose from any of the three exciting treks.



Facilities Available:

The Tourism Department has Trekking Equipment Hire Shops at Jammu, Kud and Rajouri. These stock local and imported trekking gear. Trekking parties and trekkers can hire the equipment at fixed rates.

Equipment available: are as under: Tents (Indian and Imported) 4-man tent (Indian) 2-man tent (Imported) Sleeping Bags (Imported) Carry mat (Indian & Imported) Jackets (Indian & Imported) Windcheaters (Indian) Rucksack (Indian & Imported) Trekking Boots (Indian & Imported) The equipment is issued against a cash security deposit equivalent to the cost or on a guarantee letter from any Officer of the rank of Deputy Director, Tourism/Deputy Secretary of State Government or Central Govt. If you are a foreign tourist, your passport will be held as security deposit against equipment taken on hire. Some Travel Agencies in the city can also organise trekking on different routes in Jammu. Ask for details in the Tourist Office in the TRC.



Skiing:

At Patnitop, ski courses are conducted in the months of January and February. During the winter months, there are introductory courses for tourists. The

gently graded ski slopes of Patnitop are ideal for beginners. Madha Top (6-kms. from Patnitop on the Sanasar Road) has excellent possibilities for all levels of skiing. After the newly planned ski-lift becomes operational, Madha Top will offer a range of skiing options for both professional skiers and beginners.

Facilities Available:

For tourists taking the J&K TDC package tour, 40 sets of ski equipment are available at Patnitop and Sanasar. Also available are wooden sledges locally. For beginners and for people who want to brush up their skills, the J&K Tourism Department Ski Instructors are at your service. Accommodation for skiers is available in huts of J&K TDC at Patnitop, Kud and Sanasar. There are also several private hotels at Patnitop and Kud. Restaurants and Dhabas' (roadside eateries) serve tourists round-the-year.

Aero-Sports:

J&K Tourism has introduced Equipment can be hired from the Tourist Office in Jammu city. May-June and September-October are suitable months for paragliding at Sanasar. 19 kms from Patnitop with a good approachable road and transport links. You can reach Sanasar from Jammu via Kud and Patnitop by bus or taxi.

Accommodation is available in J&K TDC huts for aero-sport enthusiasts. Shortly, other aero-sports like Parasailing and Hot-Air Ballooning will also become operational in the area.

Heritage and other Socio-Cultural Assets

FAIRS AND FESTIVALS IN LADAKH REGION

The religious philosophy of Buddhism is profound and subtle. Many of the annual festivals of the Gompas take place in winter, a relatively idle time for the majority of the people. They take the form of dance-dramas in the Gompa courtyards. Lamas, robed in colorful garments and wearing often startlingly frightful masks, perform mimes representing various aspects of the religion such as the progress of the individual soul and its purification or the triumph of good over evil.

The biggest and most famous of the monastic festivals, frequented by tourists and locals alike, is that of ~~Hnis~~ ~~Hnis~~, which falls in late June or the first half of July, and is dedicated to Padma-sambhava. Other monasteries which have summer festivals are Lamayuru (also early July) Phiyang (late July or early August) Tak-Thok (about ten days after Phiyang) and Karsh in Zaskar (11 days after Phiyang)

Spituk, Stok Thikse, Chemrey and Matho all have their festivals in winter, between November and March. Likir and Deskit (Nubra) time their festivals to coincide with Dosmoche, the festival of the scapegoat, which is also celebrated with fervor at Leh. Falling in the second half of February, Dosmoche is one of two New Year festivals, the other being Losar. At Dosmoche, a great wooden mast decorated with streamers and religious emblems is set up outside Leh.

FAIRS AND FESTIVAL IN JAMMU REGION

NAME OF FESTIVALS
Lohri
Baisakhi
Bahu Mela
Chaitre Chaudash
Purmandal Mela
Jhiri Mela
Mansar Food and Craft Mela

TEMPLES AND SHRINES IN JAMMU REGION

Vaishnodevi Shrine
Raghunath temple
Bawey Wali Mata temple
Natraj temple
Nau Gaza Peer Dargah
Sudh Mahadev
Gauri Kund
Dera Baba Banda
Baba Dhansar
Ranbireshwar Temple
Peer Khoh
Garrison Church
St. Paul's Church
St. Peter's Church
Jamia Masjid
Ibrahim Masjid
Sundar Singh Gurudwara
Tali Sahib Gurudwara
Maharani Chand Kaur Gurudwara

TEMPLES, MOSQUES AND SHRINES IN KASHMIR

Haratbal Shrine
Shankaracharya temple
Amarnath Cave
Shrines of Baba Shukardin
Pather Masjid
Chaare-e-Sharif
Mattan
Kheer Bhawani
St. Josephs Church
Tri Parbat Complex
Shah Hanan Mosque
Jamia Masjid
Baba Reshi
Maxtaud Temple
Mattan

**MONESTARIES AND GOMPAS
IN LADAKH REGION**

Spituk Gompa
Stok Gompa
Phyang Gompa
Alchi Gompa
Likir Gompa
Samkar Gompa
Shey Monastery
Stakhna Monastery
Basgo
Lamayuru Monastery
Mulbekh
Tak-Thok
Thikse Monastery
Chemrey
Matho

MUGHAL GARDENS IN KASHMIR

Name of Gardens and Parks	Name of Place
Mughal Garden Shalamar	Sri nagar
Mughal garden Nishat	Sri nagar
Mughal Garden Chasmashahi	Sri nagar
Mughal garden Parimahal	Sri nagar
Mughal Garden Achabal	Anantnag
Mughal Garden Verinag	Anantnag
Dara Shikoh Mughal Garden	Anantnag
Mughal Garden Jarogabal	Baramula (p)

BOTANIC GARDENS/ PARKS IN KASHMIR

Botanic Garden	Kokernag
Manasbal Park	Baramula
Hospital Park	Baramula (Tangmarg)
Langate Park	Kupwara
Dreygam Park	Budgam
Pahalgam project	Anantnag
Akar Park	Anant nag
Dilnag Park(Tral)	Pulwama
Jawaharlal Nehru Memorial Botanic Gardens Chasmashahi	Srinagar
VIP Guest house parkDachigam	Srinagar
Green ParkJitwan	Srinagar
Lake bank Park Nishat	Srinagar
Lake view ParkGagribal	Srinagar
Haratbal park	Srinagar

Rupa lank and Sona lank islands Parks	Srinagar
Emporium Garden	Srinagar
Pologround Park	Srinagar
New Kashmir Park	Srinagar
Secretariat lawns	Srinagar
Exhibition Grounds	Srinagar
Sonawar Parks	Srinagar
Ihal Park	Srinagar
Children Park	Srinagar
Jawaharnagar Park	Srinagar
New Airport Park	Srinagar
Buchopora Park	Srinagar
Soura Park	Srinagar
VIP residential gardens	Srinagar

PARKS & GARDENS IN JAMMU

Name of gardens and park	Name of place
Green Belt Parks	Jammu
Busing Colony Parks	Gandhi Nagar
B.C.Park	Jammu
Stadium Recreational Complex	Jammu
Rajinder/ Sheerwani Park	Jammu
Durbargah Park	Jammu
Old Secretariat lawns	Jammu
Guest /Circuit buses	Jammu
New Secretariat, Assembly, Council, Mini Secetariat and MLA Hostel Lawns	Jammu
VIP residential gardens	Jammu
Recreational Park Ramnagar	Jammu
RakhNational ParkRamnagar	Jammu
Recreational Complex	Jajjarkotli
Fountain Garden	Poonch

DAL LAKE

LAND USE IN THE CATCHMENT AREA

1985		
	Area [m2]	%
Natural landscape		
- Woody vegetation	103.00	37.4
- Scrub	3626	13.2
Agricultural land		
- Crop field	662	24.2
- Pasture land	31.25	11.4
Residential area	31.89	11.6
Horticulture	628	2.3
Total	275.20	100

LIST OF OTHER TOURIST PLACES

	<u>Kashmir</u>	
1	Cheshmashahi	Srinagar
2	Pari Mahal	Srinagar
3	Nishat	Srinagar
4	Shalimar	Srinagar
5	Hawan	Srinagar
6	hfi Parbat	Srinagar
7	Awantipora Ruines	Anantnag
8	Martand	Anantnag
9	Achabal	Anantnag
10	Verinag	Anantnag
11	Parihaspora	Baramulla
12	Karsha	Kargil
13	Mulbeck	Kargil
14	Thicksay	Leh
15	Shay Shahi hmdan Masqe	Leh
16	hmis	Leh
17	Phyang	Leh
18	Alchi	Leh
19	Lamayuru	Leh
	<u>Jammu</u>	
1	Akhnoor Fort	Jammu
2	Ancient Fort	Ramnagar
3	Old palace	Ramnagar
4	Nawab Mahal	Ramnagar
5	Shesh Mahal	Ramnagar
6	hfi Palace	Jammu
7	Mubarik Mandi	Jammu

INVESTMENT PLANS OF STATE GOVERNMENT

Status of existing developing/investment plans of schemes for the development of tourism in the region.

S.No.	Scheme	Capital in lakhs	Total
	Upgr. Or TRC SGr.	75.00	75.00
	Dev. of TSm Boulevard around lake	0.00	0.00
	Dev. of peripheral Circuit in Kashmir Valley.	100.00	100.00
	Winter Sport Gulmarg.	75.00	75.00
	Golf Course Gulmarg.	100.00	100.00
	Electrification Gulmarg.	200.00	200.00
	Water Supply Gulmarg.	100.00	100.00
	Int/Ext Roads-Drainage Gulmarg.	550.00	550.00
	Infra. Dev. Gulmarg.	125.00	125.00
	Pilgrim Tourism Gulmarg.	35.00	35.00
	Internal/Ext/roads /Drainage Pgm.	550.00	550.00
	Infra. Development Pahalgam.	240.00	240.00
	Electrification Pahalgam.	95.00	95.00
	Pilgrim Tourism Pahalgam	175.00	175.00
	Intg. Dev. Of Kokey/Verg/ Daksum/Achabal.	35.00	35.00
	Intg. Dev. Of Kupwara/ Laolab/Bungus.	15.00	15.00
	Infra Facilities Jammu.	135.00	135.00
	Pilgrim Tourism Jammu.	550.00	550.00
	Integ. Dev of Surinsar Tourist Resort.	100.00	100.00
	Infra Fac. At Udh. Incl Panch. Dudu. B.Garh.	100.00	100.00
	Integrated Dev. Of Dera Baba Bandha.	85.00	85.00
	Infra. Faci. At Shiv Khori.	50.00	50.00
	Development of Tourism in Mansar.	500.00	500.00
	Integ. Dev. of Tourism in Poonch.	30.00	30.00
	Integ. Dev. of Tourism in Rajouri.	30.00	30.00
	Integ. Dev. of Patnitop Tourist Resort.	325.00	325.00
	Integ. Dev. of Sanasar Tourist Resort.	190.00	190.00
	Integ. Dev. of Tourism in Kishtwar.	20.00	20.00
	Integ. Dev. of Tourism in Billawar.	15.00	15.00
	Dev. of Leh Manali Circuit inc. Leh.	500.00	500.00
	Dev. of Addl. Facil at Kargil/Suru/Zanaskar	500.00	500.00
	Grant in Aid to JIM	15.00	15.00
	Water Supply Pahalgam.	110.00	110.00
	Dev. of Yusmarg.	30.00	30.00
	Dev. of Manasbal.	30.00	30.00
	Dev. of Sonamarg.	250.00	250.00
	Integ. Dev. of Tourism at Bani and Basoli	100.00	100.00
	Over all released by Adm. Department.	0.00	0.00
	Loan/Relief package revival Tourism Kmr.	2500.00	2500.00
	Winter National Games.	100.00	100.00
	Reconst. Of Ziarat Faiz Tral	200.00	200.00
	Royal Spring Golf Course	0.00	0.00
	Integ. Dev. of Manitlia	100.00	10.00

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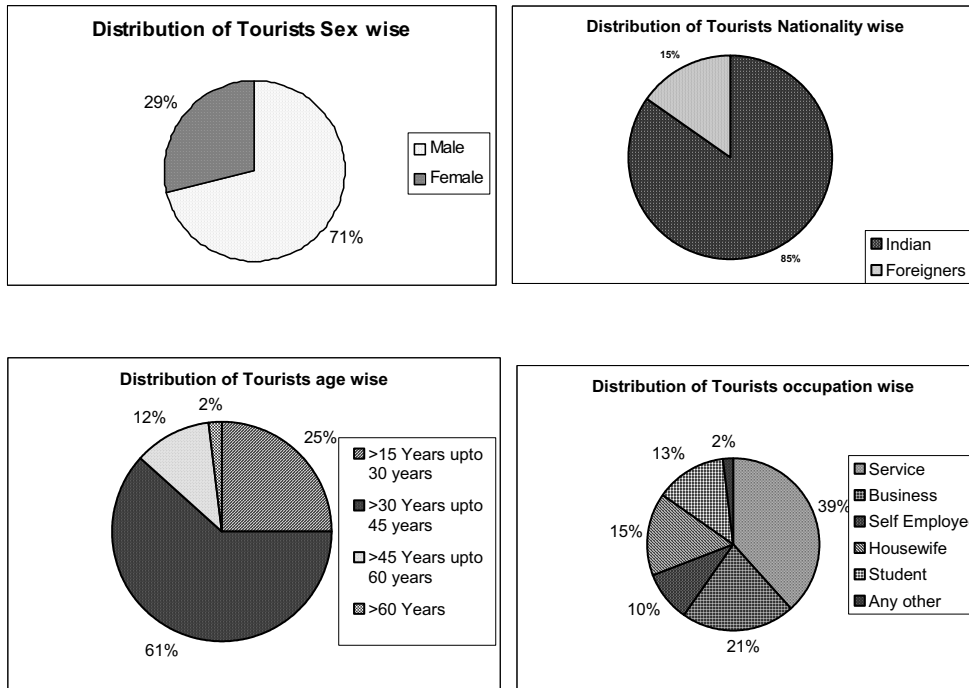
**PROJECT / SCHEMES SANCTIONED TO THE STATE OF JAMMU & KASHMIR
FOR THE YEAR 1999-2000**

S. No.	Name of the Project / Scheme	Amount Sanctioned In lakhs	Amount Released	Status / Likely date of completion
1.	Renovation / Upgradation of Tourist Complex at Sonamarg	20.00	6.00	UC awaited
2.	Renovation / Upgradation of Tourist Complex at Gulmarg	30.00	9.00	UC awaited
3.	Development of Charchinari Island and Construction of Cafeteria in Dal Lake, Srinagar	12.00	3.60	UC awaited
4.	Construction of water Pump at Katra (Jammu)	7.00	2.10	UC awaited
5.	Construction of Additional Accommodation at TRC, Srinagar	25.00	7.50	UC awaited
6.	Renovation of Accommodation at Tourist Bungalow at Verinag	25.00	7.50	UC awaited
7.	Renovation of Dormitory Accommodation at Sonamarg (Thajwas)	20.00	6.00	UC awaited
8.	Renovation of Hostel Building at TRC, Srinagar	15.00	4.50	UC awaited
9.	Reconstruction of Cafeteria at Nehru Park, Dal Lake, Srinagar	15.00	4.50	UC awaited
10.	Renovation of Tourist Reception Centre at Katra	10.00	3.00	UC awaited
11.	Integrated Development of Tourist Facilities at Sonamarg	49.95	15.00	UC awaited
12.	Tourist Reception Centre at Shivkhori	25.00	7.50	UC awaited
13.	Refurbishment of Sahasthaling Gompa at Nobra, Ladakh	15.00	0.45	UC awaited
14.	Repairs and Renovation of 12 Rooms in "D" Block of Tourist Reception Centre, Jammu	15.70	4.50	UC awaited
15.	Winter Sports Equipment for Four Places	11.78	11.78	UC awaited
16.	Information Technology	38.15	2.00	UC awaited
	Total	334.58	94.93	

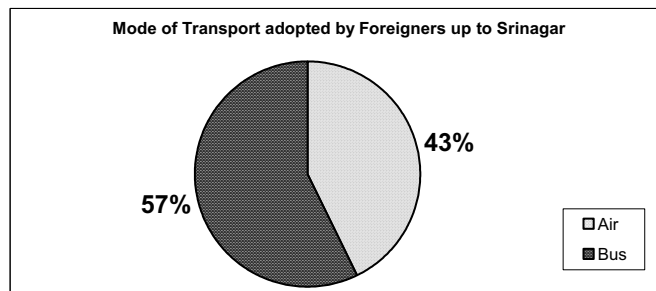
GRAPHS

Tourists in Valley

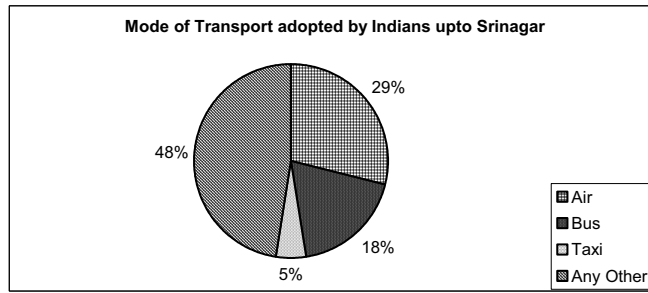
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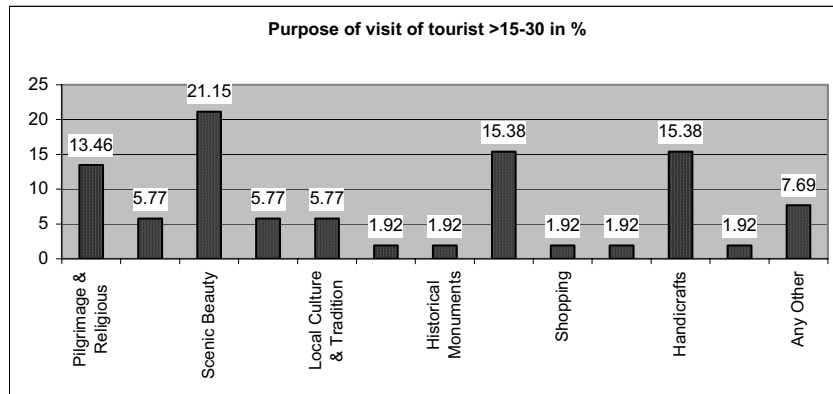
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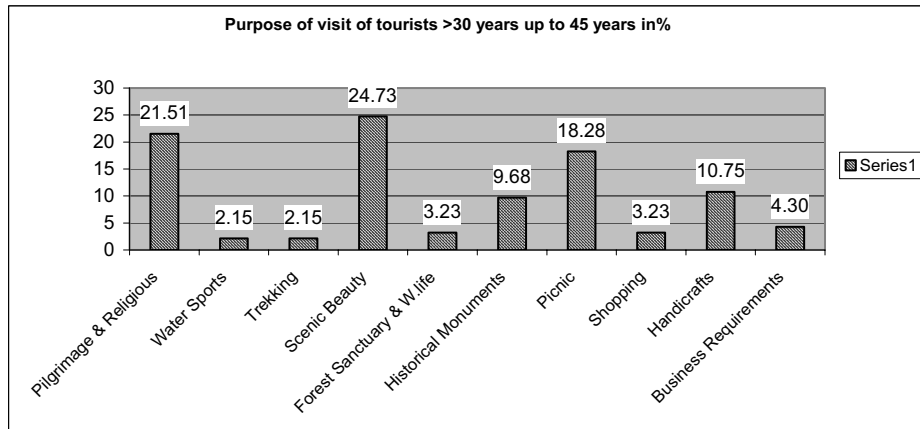
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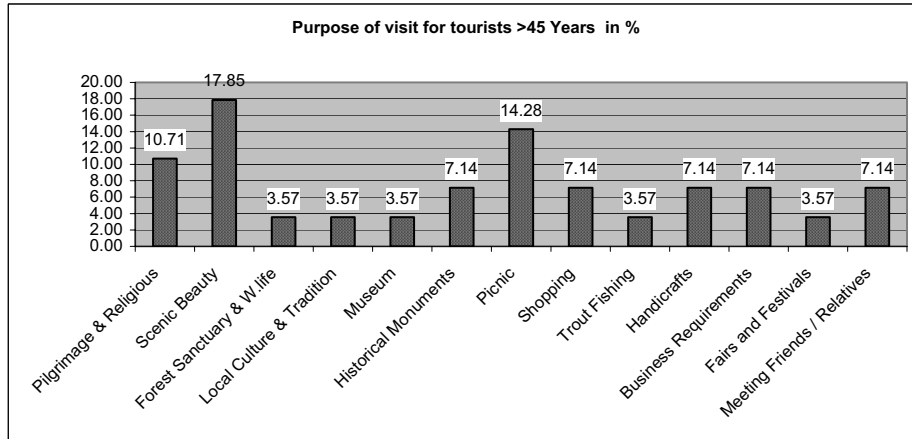
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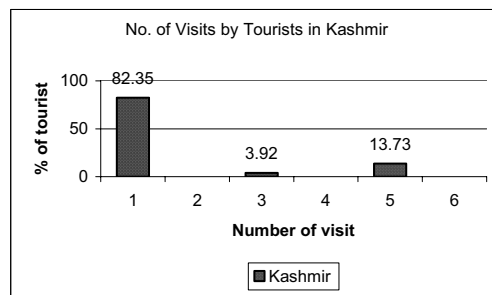
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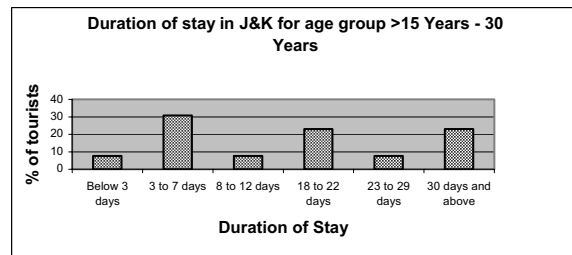
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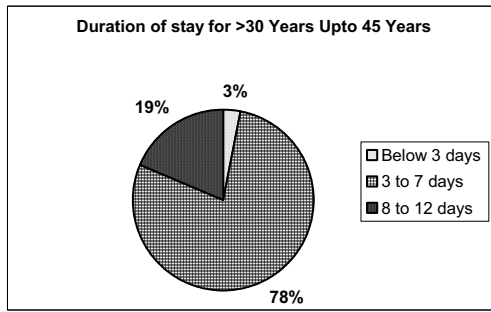
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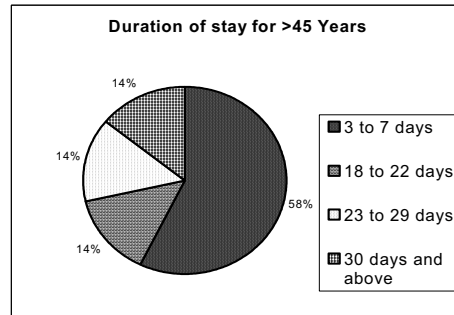
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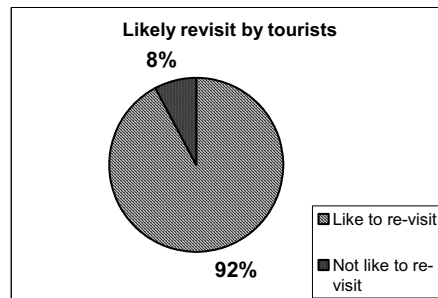
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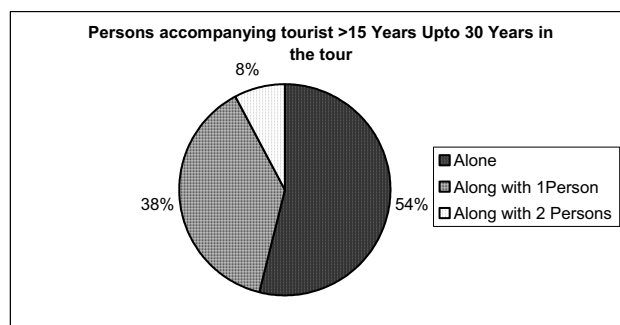
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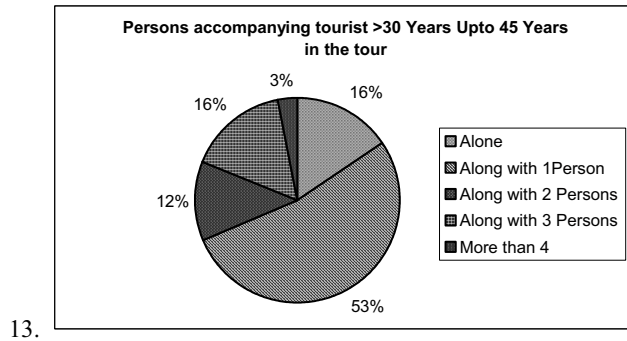


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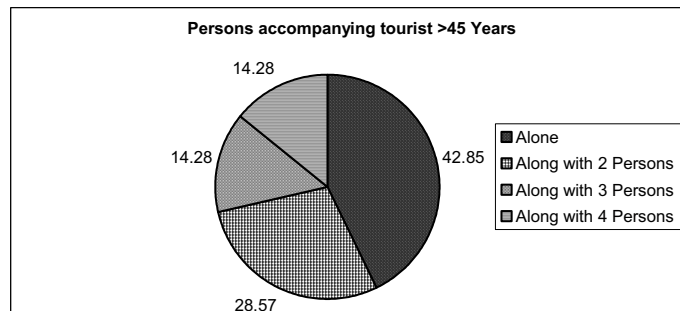


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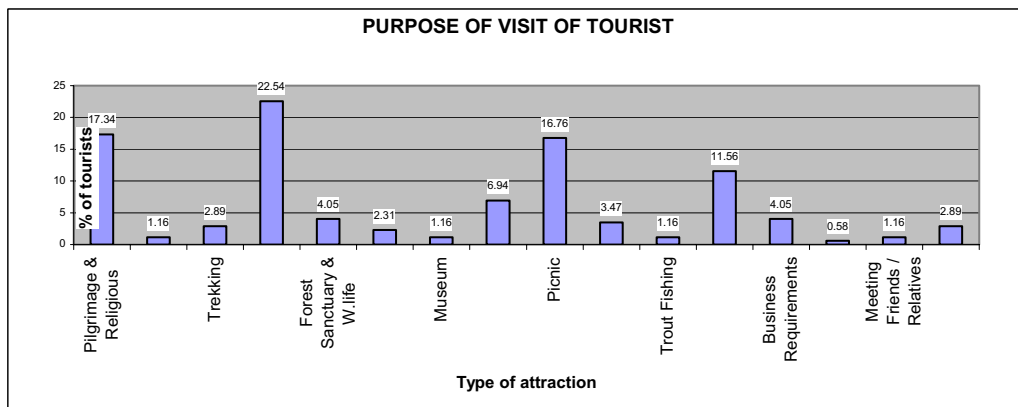




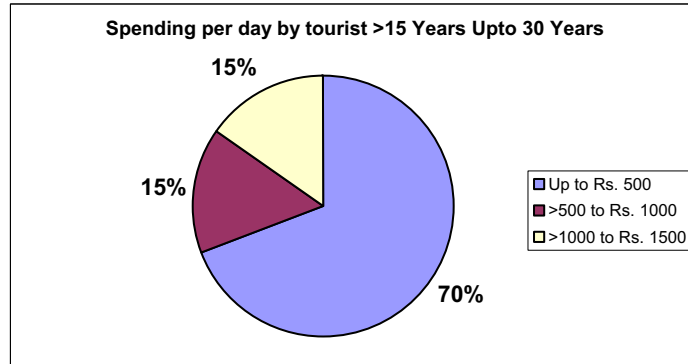
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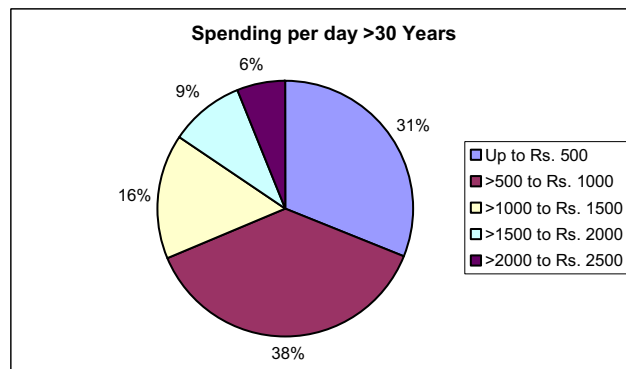
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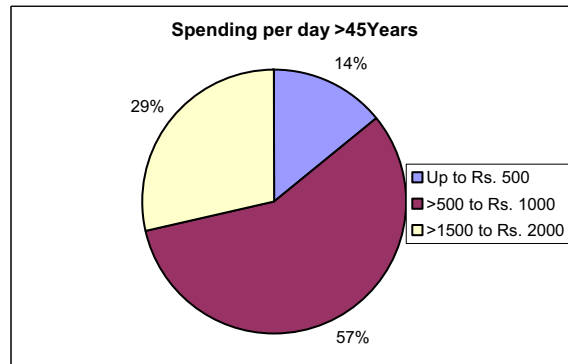
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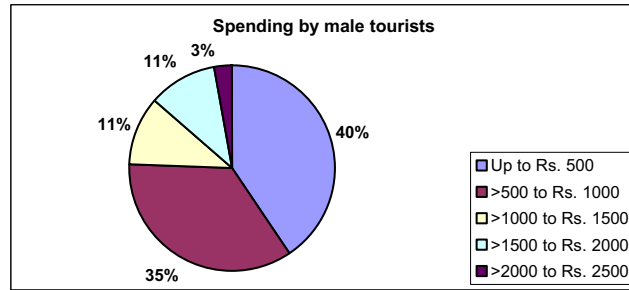
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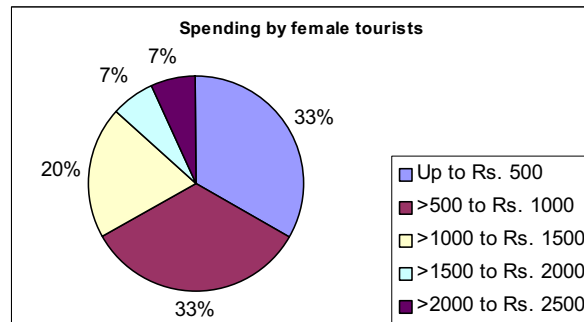
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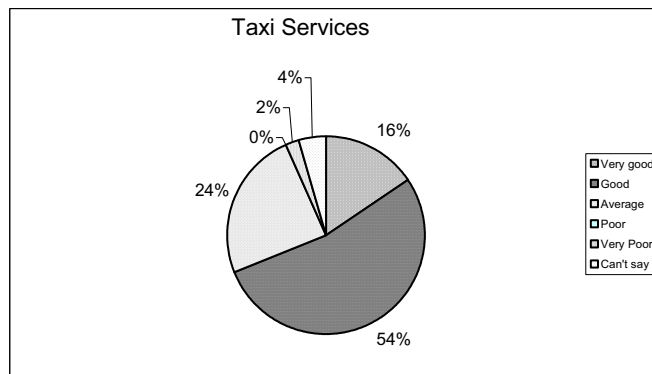
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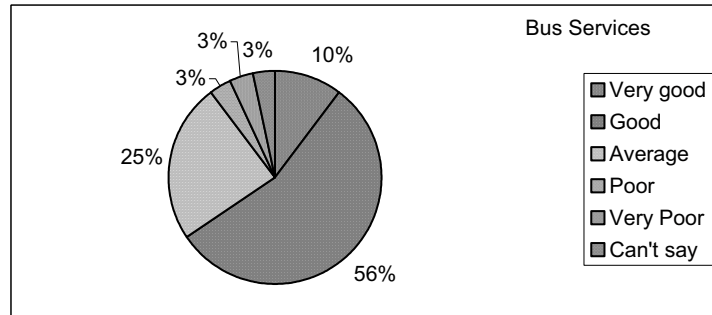
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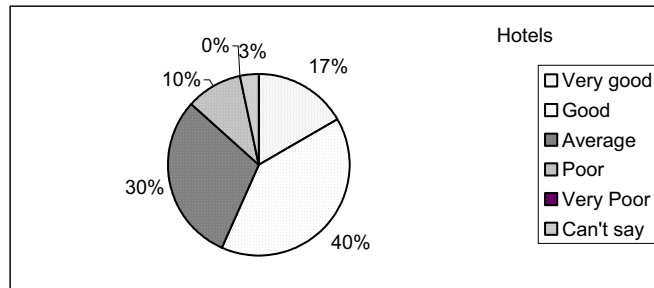
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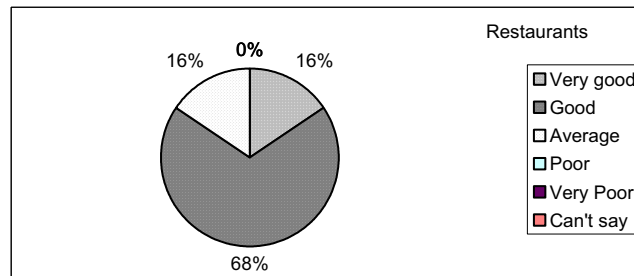
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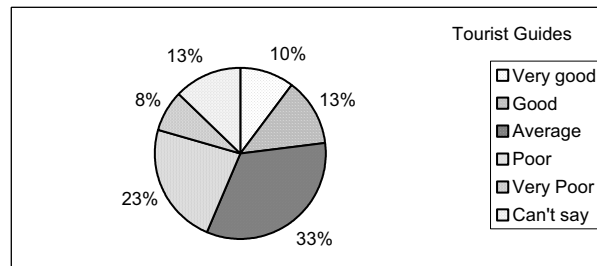
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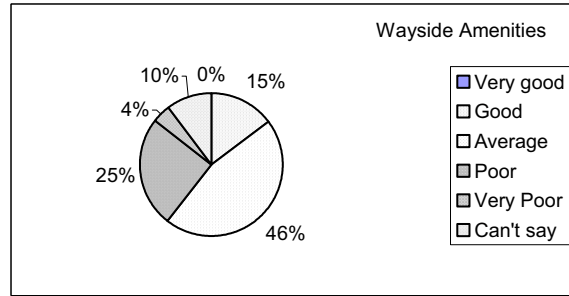
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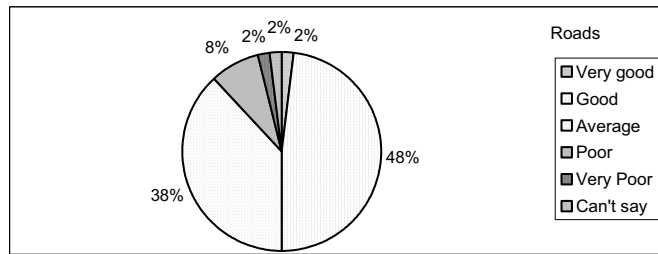
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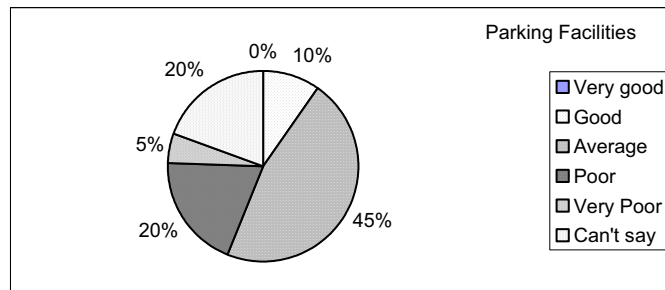
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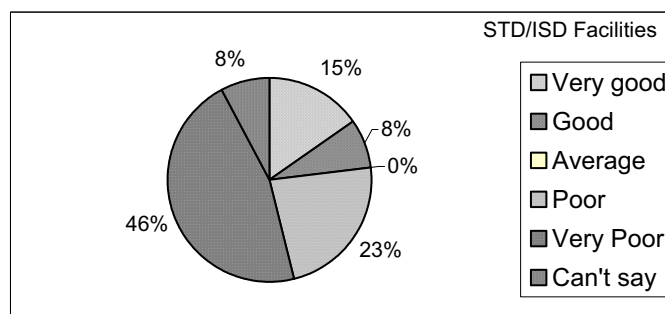
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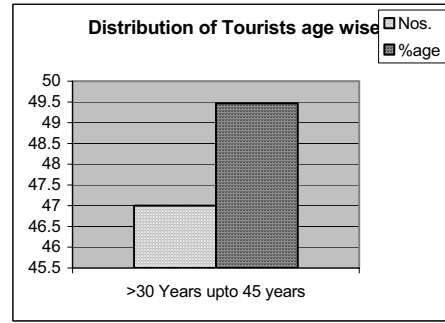
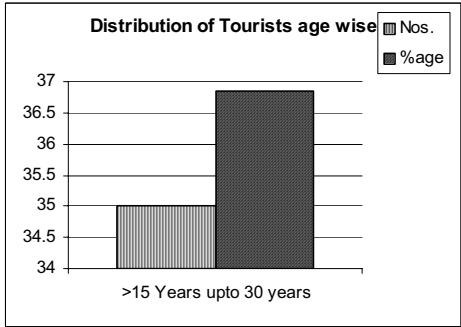
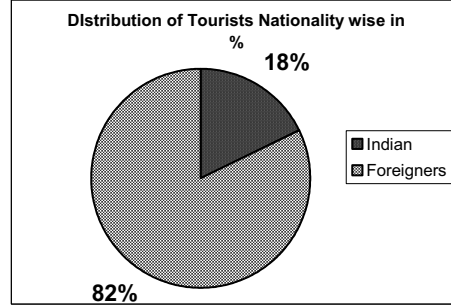
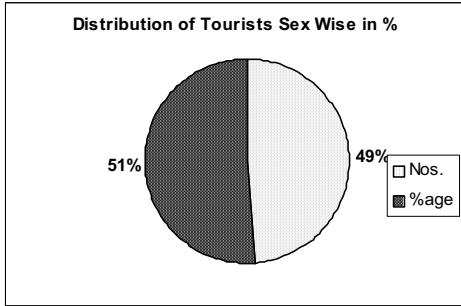
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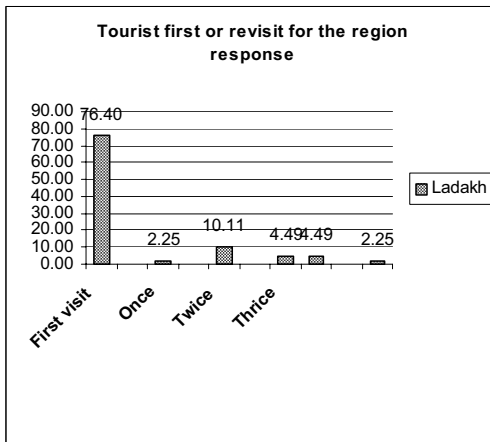
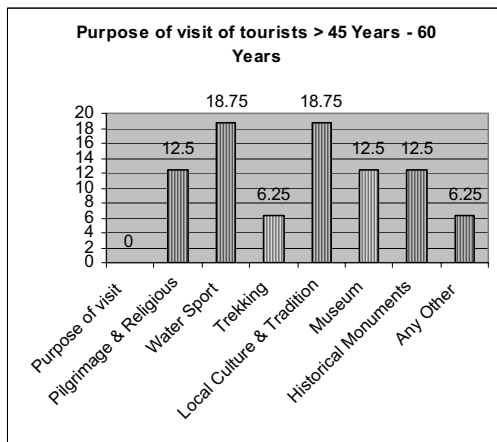
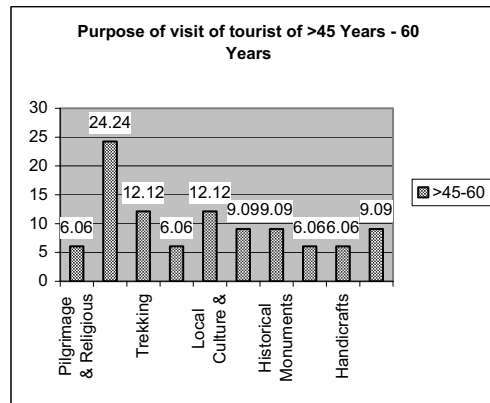
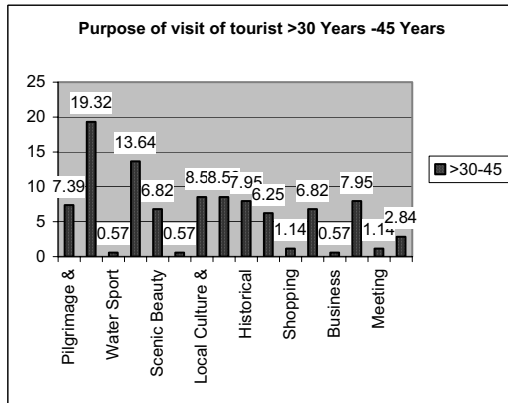
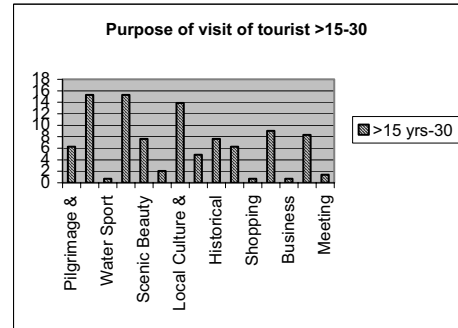
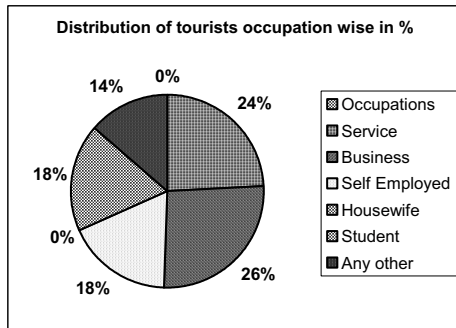


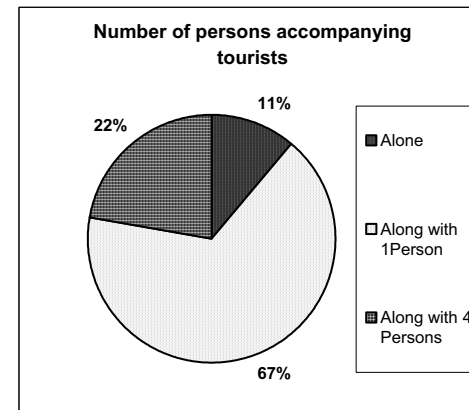
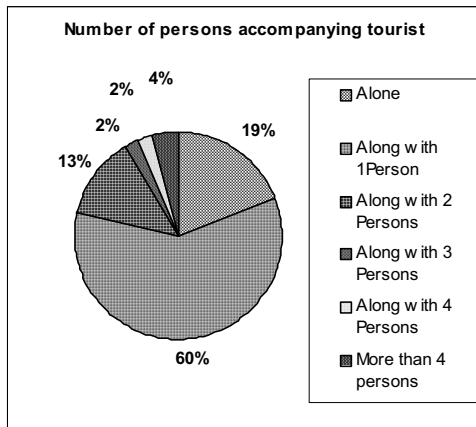
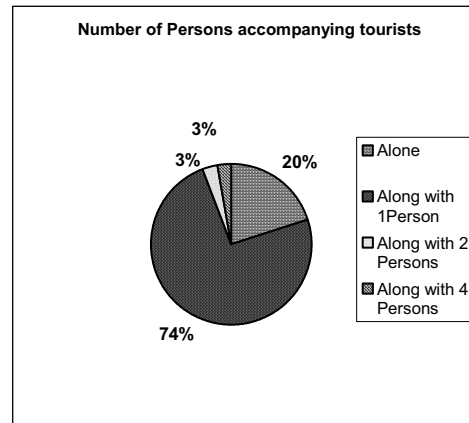
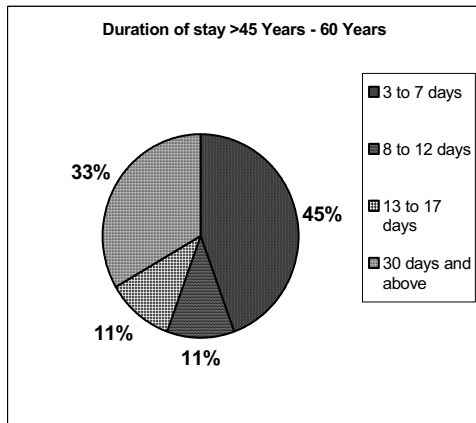
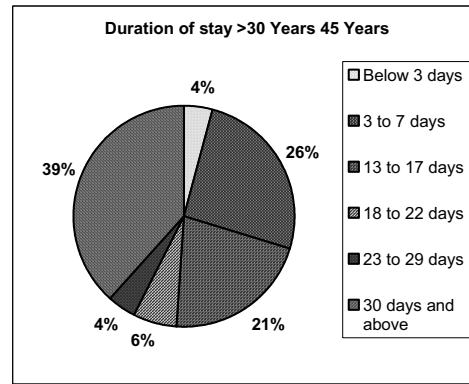
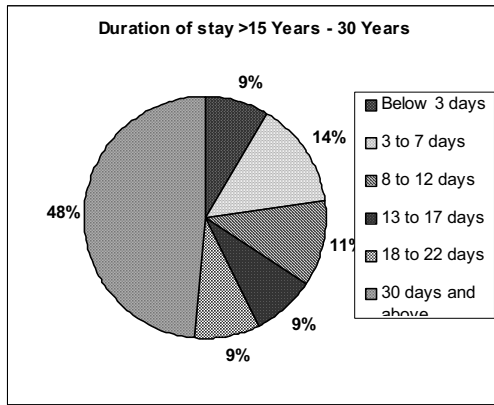
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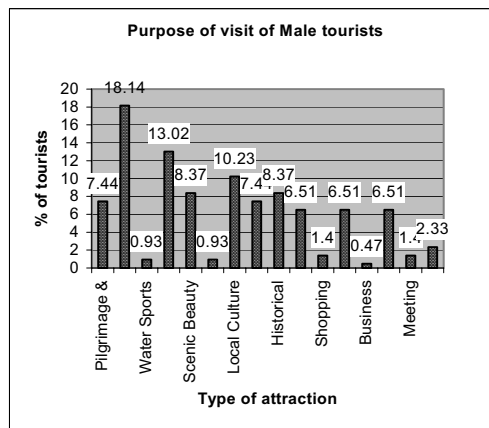
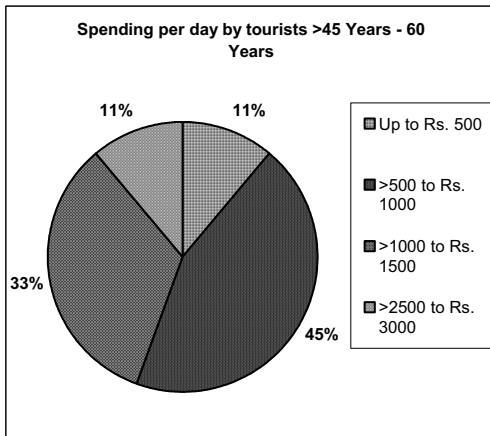
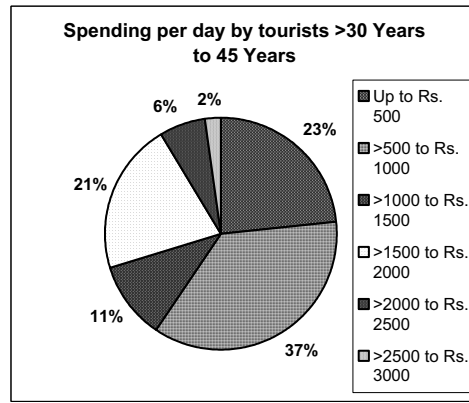
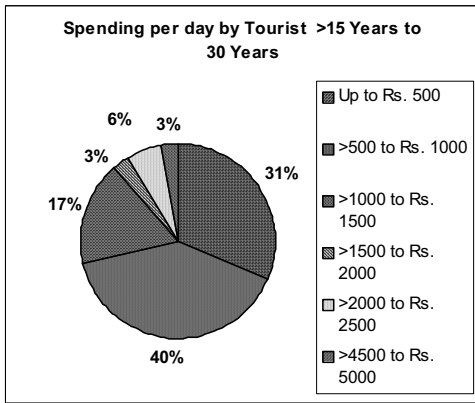


LADAKH REGION:









ANNEXURE- II
POWER GENERATED PURCHASED AND AVAILABILITY IN THE
FOLLOWING YEARS

S.No.	Year	Generated	Purchased	Total available
1	2	3	4	5
1.	1973-74	2355.91	650.00	3005.91
2.	1974-75	3028.30	403.50	3431.80
3.	1980-81	7737.70	2883.40	10621.10
4.	1981-82	7875.00	2918.30	10793.30
5.	1982-83	9338.99	2999.34	12338.33
6.	1983-84	8957.54	4207.17	13164.71
7.	1984-85	8630.90	4828.90	13459.80
8.	1985-86	8831.52	5876.59	14708.11
9.	1986-87	10660.03	7262.67	17922.70
10.	1987-88	10332.86	10205.10	20537.96
11.	1988-89	8941.20	12080.11	21021.31
12.	1989-90	9827.36	16695.71	26523.07
13.	1990-91	9116.72	18559.31	27676.03
14.	1991-92	8822.37	20369.37	29191.74
15.	1992-93	8200.74	19833.40	28034.14
16.	1993-94	8043.53	22698.60	30742.13
17.	1994-95	8791.40	22830.00	31621.40
18.	1995-96	8834.40	24873.00	33707.40
19.	1996-97	8271.11	30529.70	38800.81
20.	1997-98	9513.50	39665.50	49179.00
21.	1998-99	7133.17	47243.80	54376.97
22.	1999-00	6383.83	43466.90	49850.73

DETAILED STATEMENT OF PROJECT UNDER CONSTRUCTION

S.NO.	NAME OF POWER HOUSE	CAPACITY (MW)	TARGET FOR COMMISSIONING
STATE SECTOR			
1	JHELUM BASIN		
	i. 3 rd UNIT OF USHP-II	35.00	2002
	ii. PAHALGAM	3.00	2002
	iii. MACHAIL	0.35	2002
	iv. NEW GANDERBAL	60.00	10 th Plan
	v. PARNAI	37.50	10 th Plan
S.NO.	NAME OF POWER HOUSE	CAPACITY (MW)	TARGET FOR COMMISSIONING
1	CHENAB BASIN		
	i. BAGLIHAR	450.00	2005
	ii. BHADERWAH	1.50	2002
	iii. SAWALAKOT	600.00	2010
1	INDUS BASIN		
	i. SANJAK	1.26	2002
	ii. MARPACHOO	0.75	2002
	iii. HAFTAL	1.00	2002
	iv. IGO-MERCELLONG	3.00	2003
	v. DUMKHAR	2.25	2005
3	RAVI BASIN		
	i. SEWA-III	9.00	2002
CENTRAL SECTOR			
1	CHENAB BASIN		
	i. DUL HASTI	390.00	2003-04
	TOTAL	1594.61	

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PROJECT TRANSFERRED TO NHPC FOR CONSTRUCTION
UNDER CENTRAL SECTOR

S.NO	BASIN/NAME OF PROJECT	CAPACITY(MW)
1	JHELUM BASIN	
	I. URI-II	280.00
	II. KISHENGANGA	330.00
2	CHENAB BASIN	
	I. PAKULDUL	1000.00
	II. BURSAR	1020.00
3	INDUS BASIN	
	I. CHUTUK	18.00
	II. NIMO-BAZGO	30.00
4	RAVI BASIN	
	I. SEWA-II	120.00

SANTEK CONSULTANTS PVT. LTD.
NEW DELHI

STATEMENT OF SCOPE FOR ADDITION CAPACITY IN THE EXISTING/UNDER CONSTRUCTION/PROPOSED STATION AFTER CREATION OF STORAGES IN THE UPPER REACHES OF THE RIVER BASIN

S.NO	NAME OF PROJECT	PRESENT CAPACITY (MWS)	SCOPE FOR ADDITIONAL CAPACITY (MWS)	TOTAL
A	JHELUM BASIN			
1	URI-I	480	480	960
2	URI-II	280	280	560
	SUB TOTAL	760	760	1520
B	CHENAB BASIN			
1	BAGLIHAR	450	450	900
2	SAWALAKOT	600	600	1200
3	DULHASTI	390	390	780
4	PAKULDUL	1000	1000	2000
5	RATTLE	170	170	340
	SUB TOTAL	2610	2610	5220
	GRAND TOTAL	3370	3370	6740

**PERCENTAGE OF INHABITED CENSUS VILLAGES
ELECTRIFIED ENDING 192000**

S.No.	District	Inhabited villages		
		Total	Electrified	Percentage Electrified
1	2	3	4	5
1.	Anantnag	626	626	100.00
2.	Pulwama	536	536	100.00
3.	Srinagar	168	168	100.00
4.	Budgam	475	475	100.00
5.	Baramulla	646	625	96.75
6.	Kupwara	365	345	94.52
7	Leh	112	100	89.29
8.	Kargil	127	103	81.10
9	Jammu	1054	1054	100.00
10.	Udhampur	618	582	94.17
11.	Doda	652	585	89.72
12.	Kathua	555	551	99.28
13.	Rajouri	375	357	95.20
14.	Poonch	168	167	99.40
	State	6477	6274	96.87

TOTAL AREA UNDER FOREST

Division	Geographical area (sq. Kms)	Forest are (sq. Kms)	Forest area as % of geog. Area
Kashmir	15948.00	8115.00	50.88
Jammu	26293.00	12050.00	45.83
Ladakh	59146.00	17.00	0.03
Area under illegal occupation	120849.00	--	--
Total J & K State	2222236.00 *	20182.00	--

TOTAL PROTECTED FOREST AREA

Division	Geographical area (Sq. Kms)	Protected area network (Sq. Kma)	Percentage
Kashmir	15948.00	1536.07	9.63%
Jammu	26293.00	953.12	3.62%
Ladakh	96701.00	14799.00	15.30%
Total	138942.00	17288.19	12.44%

TOTAL FOREST AREA AND WILD LIFE AREA DISTRICT WISE
AREA UNDER FOREST (SQKMS.)

S.No.	District	Forest area	Wild life area	Total forest area
1	2	3	4	5
1.	Anantnag	2068.00	546.75	2614.75
2.	Pulwama	810.00	273.25	1083.00
3.	Srinagar	380.00	311.00	691.00
4.	Budgam	477.00	3.25	480.25
5.	Baramulla	2690.00	384.75	3074.75
6.	Kupwara	1703.00	-	1703.00
7.	Leh	29.00	13018.00	13047.00
8.	Kargil	7.00	112.00	119.00
9.	Jammu	959.00	256.50	1215.50
10.	Udhampur	2343.00	42.25	2385.25
11.	Katua	991.00	44.75	1035.75
12.	Doda	5555.00	418.00	5973.00
13.	Rajouri	1267.00	-	1267.00
14.	Poonch	951.00	-	951.00
	Total	20230.00	15410.50	35640.50

Specie-wise provisional forest area by composition
(Area in Sq. Kms)

S.No	Classification (specie-wise)	1996-97	1997-98	1998-99	1999-00
1	2	3	4	5	6
1.	Coniferous (soft wood)				
	(a) Dealar	1277.00	1075.27	1075.00	1075.00
	(b) Chir	1825.00	1824.82	1825.00	1825.00
	(c) Kail	1991.00	1968.37	1969.00	1969.00
	(d) Fir	3534.00	3400.93	3401.00	3401.00
	(e) Others	9698.00	10075.78	10075.00	10075.00
	Total coniferous (soft wood)	<u>18325.00</u>	<u>18345.17</u>	<u>18345.00</u>	<u>18345.00</u>
2.	Non-coniferous (soft and hard wood)	1905.00	1885.24	1885.00	1885.00
3.	Uncommercial reserves				
	Rakhs and wild life reserves	<u>1962.90</u>	<u>1962.90</u>	<u>1962.90 (R)</u>	<u>1962.90</u>
	Grand Total	22192.90	22193.31	22192.90	22192.90

R- Repeated

Source : D.F.O. Forest, Statistics

Trends in urbanization, 191-2001

Census year	Total number of U.As/town	Total population	Total urban population	Percent urban population	Decennial growth		Annual exponential growth rate (urban)
					Absolute	Percent	
1	2	3	4	5	6	7	8
1901	2	2,139,362	158,748	7.42	-	-	-
1911	45	2,292,535	268,518	11.71	+109,770	+69.15	+6.92
1921	29	2,424,359	267,754	11.04	-764	-0.28	-0.03
1931	31	2,670,208	317,805	15.39	+50,051	+18.69	+1.87
1941	32	2,946,728	386,565	13.12	+68,760	+21.64	+2.16
1951	25	3,253,852	457,213	14.05	+70,648	+18.28	+1.83
1961	43	3,560,976	593,315	16.66	+136,102	+29.77	+2.98
1971	45	4,616,632	858,221	18.59	+264,906	+44.65	+4.47
1981	58	5,987,389	1,260,403	21.05	+402,182	+46.86	+4.69
1991	-	-	-	-	-	-	-
2001	75	10,069,917	2,505,309	24.88	+1,244,906	+98.77	+4.94

Note : No census was conducted in Jammu & Kashmir State in 19

Estimated craft wise production and employment of Handicraft Industry

(Figures in Lakhs)

S.No.	Year	Carpet		Nanda		Crewel		Mood-Carving	
		P	EMP	P	EMP	P	EMP	P	EMP
1	2	3	4	5	6	7	8	9	10
1.	1988-89	66.70	0.64	2.75	0.04	10.25	0.25	5.40	0.05
2.	1989-90	64.50	0.68	2.70	0.04	10.15	0.25	5.35	0.05
3.	1990-91	84.55	0.74	2.90	0.05	16.70	0.27	5.65	0.06
4.	1991-92	93.90	0.71	2.95	0.06	12.80	0.28	5.81	0.07
5.	1992-93	101.10	0.73	2.97	0.06	13.05	0.30	5.90	0.07
6.	1993-94	109.40	0.76	3.02	0.06	13.40	0.30	5.95	0.07
7.	1994-95	111.71	0.79	3.08	0.06	13.67	0.30	-	-
8.	1995-96	112.60	0.79	3.13	0.06	13.90	0.32	6.12	0.07
9.	1996-97	117.10	0.80	3.26	0.07	14.46	0.32	6.36	0.07
10.	1997-98	121.60	0.82	3.40	0.07	15.01	0.34	6.60	0.08
11.	1998-99	126.1	0.83	3.53	0.08	15.56	0.343	6.84	0.081
12.	1999-00	541.00	0.889	9.00	0.084	1.50	0.351	3.08	0.085

Estimated craftwise production and employment of Handicraft industry

S.No.	Year	Paper-machine		Fur & Leather		Chain stich		Woolen shawls		Other Handicrafts		Total	
		P	EMP	P	EMP	P	EMP	P	EMP	P	EMP	P	EMP
1	2	11	12	13	14	15	16	17	18	19	20	21	22
1.	1988-89	4.25	0.06	1.57	0.03	2.10	0.03	19.50	0.46	41.35	0.44	154.00	2.00
2.	1989-90	4.20	0.06	1.60	0.04	2.05	0.03	19.40	0.48	40.05	0.47	150.00	2.10
3.	1990-91	4.50	0.06	1.80	0.04	2.25	0.03	22.05	0.51	65.00	0.49	200.00	2.25
4.	1991-92	4.55	0.07	1.97	0.04	2.40	0.04	22.45	0.56	70.37	0.58	220.00	2.40
5.	1992-93	4.58	0.07	2.02	0.05	2.52	0.05	26.23	0.60	71.61	0.58	229.00	2.51
6.	1993-94	4.60	0.07	2.05	0.05	2.55	0.05	27.05	0.67	71.98	0.56	240.00	2.59
7.	1994-95	4.69	0.07	2.09	0.05	2.60	0.05	27.61	0.70	79.55	0.65	245.00	2.70
8.	1995-96	4.80	0.07	2.12	0.05	2.70	0.05	27.80	0.72	76.83	0.65	250.00	2.78
9.	1996-97	5.00	0.08	2.12	0.06	2.80	0.06	28.91	0.74	79.91	0.70	260.00	2.90
10.	1997-98	5.20	0.08	2.28	0.06	2.91	0.06	30.02	0.77	82.98	0.72	270.00	3.00
11.	1998-99	5.40	0.086	2.36	0.069	3.02	0.064	31.14	0.812	86.05	0.737	280	3.10
12.	1999-00	36.20	0.092	2.00	0.075	18.00	0.065	16.25	0.818	6.00	0.741	633.03	3.20
P - Production		Emp		- Employment									

SANTEK CONSULTANTS PVT. LTD.
NEW DELHI

**Progress of revenue and expenditure
Amount (Rs. In crores)**

S.No.	Period	Revenue receipts	Expenditure charged to revenue	Capital expenditure outside revenue account
1	2	3	4	5
1	1989-90	967.91	1071.92	391.48
2	1990-91	1157.81	1249.05	551.73
3	1991-92	1625.42	1521.40	535.65
4	1992-93	2048.94	1781.92	447.20
5	1993-94	2227.33	1768.35	533.38
6	1994-95	3026.87	2324.40	665.91
7	1995-96	3256.41	2515.71	817.87
8	1996-97	3690.18	2898.56	933.24
9	1997-98	4287.68	3479.64	1204.90
10	1998-99	4316.06	3999.24	1039.77
11	1999-00	5237.30	5355.68	1087.00

General Information Jammu & Kashmir in Indian Economy

S.No.	State/UTs	Population per bank	Average road length per 1000 sq. kms of area 31.03.19	Registered motor vehicles per 100 sq. kms of area (00) 19-0	No. of post offices per lakh of population (Nos.) 19-9	Per Capita income at current prices (Rs.) 19-9	Per Capita income at constant (181) prices (Rs.) 19-9
1	2	3	4	5	6	7	8
1	Andhra Pradesh	14.86	625	9114	22	9859	2130
2	Arunachal Pradesh	16.18	142	176	N.A	12032 (P)	3444 (P)
3	Assam	20.39	873	4598	15	7012 (F)	1763 (F)
4	Bihar	19.17	505	7642	12	4097 (Q)	3816 (D)
5	Goa	5.29	1825	52939	18	19719 (Q)	6227 (Q)
6	Gujarat	13.07	554	17234	19	14675 (Q)	3799 (Q)
7	Haryana	13.53	617	21695	14	16392 (Q)	4029 (P)
8	Himachal Pradesh	8.10	534	2125	44	9737	2628
9	Jammu & Kashmir (I)	11.90 (c)	134 (c)	295 (c)	17 (c)	10272 (Q)	7297 (Q)
10	Karnataka	11.10	729	11718	19	10504 (P)	2668 (P)
11	Kerala	10.00	3572	30006	16	10309 (P)	2325 (P)
12	Madhya Pradesh	17.09	476	5213	15	7445 (Q)	1875
13	Maharashtra	14.68	731	13093	14	17666 (P)	4866 (P)
14	Manipur	27.05	479	2796	N.A	1894 (F) (P)	2155 (P) (F)
15	Meghalaya	12.29	344	2032	N.A	6826 (P) (F)	1714 (P) (F)
16	Mizoram	11.54	312	868	N.A	9570 (F)	-
17	Nagaland	21.13	757	5948	N.A	6638 (g)	2170 (g)
18	Orrisa	16.17	1345	4220	23	5893 (P)	1469 (P)
19	Punjab	9.50	1207	38301	17	18213 (Q)	4371 (Q)
20	Rajasthan	15.63	380	5171	20	8481 (Q)	2247
21	Sikkim	11.90	261	1285	N.A	5729 (Q) (g)	3492 (Q) (g)
22	Tamil Nadu	12.95	1572	21321	20	11708 (Q)	2918 (Q)
23	Tripura	19.44	1470	3468	N.A	5432 (Q)	2197 (Q)
24	Uttar Pradesh	18.28	727	10126	13	6733 (Q)	1763
25	West Bengal	17.55	695	13468	12	9441 (P)	2876
26	Delhi	9.96	15351	1773192	4	19779 (P) (F)	6049 (P) (F)
27	All India	14.93	917	10209	16	10771	2761

List of Tourist Offices in the State.		
S.No	Particular	District
1	2	3
1	Main Office	TRC Srinagr
2	Divisional Office	TRC Jammu
3	Tourist Office Pahalgam	
4	Tourist Office Kokernag	
5	Tourist Office Achabal	Anantnag.
6	Tourist Office Daksum	
7	Tourist Office Verinag	
	Sub office.	
8	Tourist Office Gulmarg	Baramulla
9	Tourist Office Manasbal	Baramulla
10	Tourist Office Kargil	Kargil
11	Tourist Office padum	Kargil
12	Tourist Office Drass	Kargil
13	Tourist Office Zanskar	Kargil
14	Tourist Office leh	Leh
15	Tourist Office udhampur	Udhampur
16	Tourist Office Batote	Doda
17	Tourist Office Patnitop	Udhampur
18	Tourist Office Kishtwar	Doda
19	Tourist Office mansar	Kathua
20	Tourist Office lakhanpur	Kathua
21	Tourist Office Jammu	
	Airport	Jammu
22	Tourist Office Srinagar	
	Airport	Budgam
23	Tourist Office Katra	Udhampur