Assessing Tourism Infrastructure in the City of Hyderabad, India

Name: Shriya Rangarajan
Capstone Advisor: Prof. Marc Doussard
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Hyderabad is a city in the Indian state of Andhra Pradesh and one of the major metros in Southern India. The region developed as a princely state, independent of British rule until the time of India’s independence in 1947 at which time it was integrated into the Republic of India. Rich in history, Hyderabad is the meeting point of North and South Indian traditions and cultures and is today, a cosmopolitan city that is home to people of all cultures, languages and religions be they Hindus, Muslims or Christians. The city boasts of a variety of ancient monuments and sites of historical and cultural significance that was built under the patronage of the Nizams and the Qutb Shahi dynasty, including the Charminar and Golconda Fort which are of national importance as well as a number of other tombs, museums and cultural sites.

Despite their historical significance, these monuments face a number of stresses from pollution, people and transportation which has caused the accelerated degradation of these monuments. For example, a chunk of the Charminar broke off and fell down which was believed to be due to the high traffic volumes immediately adjacent to the monument.

There are a number of policies in place to preserve these structures such as the Ancient Monuments and Archaeological Sites and Remains Act which is targeted at the conservation of ancient monuments and structures as well as national and state tourism policies that seek to harness the popularity of these sites and promote them as tourist attractions for revenue. Other policies adopted by the municipal corporation at the city level seek to prevent the demolition and degradation of heritage sites and instead promote their preservation through tax incentives and adaptive reuse.

However, these policies see very poor implementation due to a variety of issues including resistance from stakeholders, widespread corruption and considerable indifference from authorities. Further, the division of authority and administration is divided among several bodies with little cooperation or synergy between them which further makes the process of administration very difficult. A number of policies including price structures have not been revised in several years which make them outdated. There is considerable apathy within these authorities who are highly averse to commercializing the monuments in even a moderate way. For example, most monuments have very low priced entrance fees so that they be affordable to all. Entry fees however are disproportional to maintenance costs and the income they generate is insufficient to cover basic maintenance let alone any other form of investment.

This low entry fees has resulted in an indiscriminate number of people visiting on a daily basis which further serves to stress the monument. With very little regulation in place, some of these people vandalize the monument with scribbling and etchings all over; renovating these is probably cost prohibitive combined with general indifference from authorities. Raising prices however brings with a fair share of other issues including equity concerns and resistance from citizens who consider these monuments a part of their cultural heritage.

These monuments however have a great
degree of potential and can be harnessed as a draw for tourists. Most people who visit from within the country i.e. domestic tourists, come for the heritage and historical draws that the city has. Tourism authorities seek to capitalize on this popularity by enhancing investment in the sector by building infrastructure and training institutes for the hospitality industry to churn out professionals and personnel for the rapidly developing sector. There is however a lack of other kinds of support infrastructure be it adequate public transportation, affordable hotels that cater to all income classes, suitable facilities and services on-site or advertising and information services.

Apart from the formal infrastructure and government procedures for tourism, there also exists an informal tourism economy that functions parallel to the mainstream. This informal sector is highly functional and includes all nature of hospitality services that function in an interdependent, synergistic manner and caters to a completely different demographic of lower to middle income classes, student groups and lone travelers who seek functionality rather than extreme convenience. The informal sector is highly developed and could well be an essential component for an effective tourism circuit in the city. It is however not without its share of problems including victimization and corruption of its members which needs to be addressed.

The study seeks to identify those challenges that visitors in the city face, the shortcomings of the existing infrastructure as well as potential interventions and policies to address them. These deficiencies were identified via a tourist survey taken at popular tourist attractions in the city which identified the main problems with infrastructure and services; these findings were substantiated by conducting site visits to major attractions and monuments and viewing firsthand the problems that they face. Aside from this, interviews were conducted with various professionals and staff to get information on tourism practices and policies in the state and direction in which the sector is headed. These were analyzed critically and recommendations suggested where suitable.
History of Hyderabad

Hyderabad is one of the largest cities in India and the capital of the Indian state of Andhra Pradesh, the capital being shared with the state of Telangana which recently seceded from Andhra Pradesh. The growth of the city to its present status as one of the largest in India has been meteoric and colored by the rise and fall of several dynasties. They retained control of the region until after independence in 1948 when they joined the Indian republic; Hyderabad has, as a consequence remained relatively free of the influences of the British rule in India.

The initial rulers were the Qutb Shahi rulers who usurped control from the Bahamani sultanate in 1518. They initially controlled the city from the Golconda area (where the Golconda Fort and outer walls exist) but as the city prospered, the need for expansion prompted the rulers to establish a new city in 1598 along the Musi River, barely five miles from the existing Golconda fortress. The center of this newly founded city was the four-minaret monument, the Charminar, from which roads diverged outwards to the city that was to be Hyderabad. Despite the changes that have taken place in the last 400 years since, the Charminar and Golconda fort continue to serve as icons for the city. (Figure 1)

The Qutb Shahi dynasty was followed by a period of Mughal rule before being taken over by the Nizams in 1724. The Nizams were among the wealthiest people in the world and greatly supported arts, literature, architecture and food and under their patronage, the city flourished both economically and culturally. This period resulted in some of the most unique and valuable contributions in terms of cultural capital: Hyderabad’s growth as a pearl and diamond trading center, a distinctive cuisine and unique religious constitution. The Nizams established alliances with the British, which allowed them to retain control of the region as an independent

Figure 1 (a) Golconda Fort in Hyderabad (b) The Charminar which is the center of the old city
Source: hyd.co.om
princely state with its own currency, railways and postal system, until independence in 1947. After the union of India was established, Hyderabad, despite the Nizams’ best efforts, was forcibly conglomerated into the Republic of India.

In the 65 years since then, Hyderabad has grown into one of the largest metropolitan cities in India, with a population of over 6 million. It functions as a hub for information technology, pharmaceuticals and film making with several related companies choosing to locate here; it continues to grow very rapidly to this day. (Hyderabad History, n.d.) (City History, n.d.)

Motivations behind the study

By virtue of its history, Hyderabad has a tremendous amount of cultural capital and heritage that is of great interest to people, locals and outsiders alike. The city could well be a hub for tourism in south India with the attractions it has to offer. This cultural capital has however seen a lot of decay in recent years.

A report in 2013 estimated that over 15 percent of the 140 heritage structures in Hyderabad were on the verge of collapse and require immediate work to restore them and avoid a complete demolition. Some of these structures such as the Akram Ali Deodhi functions as a passage for the public and could well prove to be disastrous if it collapses. (Mohammed, 2013) Another article commented on the fact that air pollution and high vehicular densities in the city was causing monuments like the Charminar and others within the 300 meter heritage zone to turn black and the plaster to peel. (PS, 2013) Both articles talk of the fact that despite recommendations from the Heritage Conservation Committee and orders from the State High Court to specifically restrict activity in the area, the government and Municipal Corporation continue to ignore the instructions. The absence of a heritage policy and administrative framework have contributed largely to the accelerated degradation of these structures. (PS, 2013) (Mohammed, 2013)

The city and its monuments however have great potential. They can be harnessed as a cultural resource for the city and its citizens apart from serving as a draw for visitors to the city. The potential benefits of tourism further help to demonstrate the importance of developing the tourism sector and by extension preserving the cultural heritage of the city. Development of this sector would require directed growth in infrastructure and services apart from better management of tourist sites. This study hopes to identify gaps and suggest improvements for focused growth and management of the tourism industry in Hyderabad.
The United Nations World Tourism Organization defines tourism as “Tourism is a social, cultural and economic phenomenon which entails the movement of people to countries or places outside their usual environment for personal or business/professional purposes. These people are called visitors (which may be either tourists or excursionists; residents or non-residents) and tourism has to do with their activities, some of which imply tourism expenditure.” (United Nations World Tourism Organization, n.d.)

Need for Tourism in India

India’s National Tourism Policy of 2002 recognizes that in the last few decades a “tourism revolution has been sweeping the globe”. India with her rich diversity should capitalize on this great strength and promote investment in the tourism industry as it has the capacity to accelerate economic growth and generate employment in the country. Socially, it develops social potential and influences progressive ideas of cultural pride, global attitudes and tolerance for differences. Further, it has the capability of advancing India’s global impact and encouraging her progress towards being an economic superpower. (Ministry of Tourism, Government of India, 2011) (Department of Tourism, Ministry of Tourism and Culture, Government of India, 2002)

Economic Impacts of Tourism

The World Travel and Tourism Council has studied the impacts that the tourism industry has on economic growth in the country, which have been discussed further.

Direct, Indirect and Induced economic growth

The total economic impact that a sector produces is a combination of the direct, indirect and induced effects that the sector produces. For the travel and tourism industry, direct effects include growth specific to the industry such as in accommodation, hospitality, catering, recreation, transportation etc. Indirect effects include those in related or

![Figure 2 (a) Direct, Indirect and Induced Impacts of Tourism growth (b) Travel and tourism contribution to GDP as compared to other industries. Source: World Tourism and Travel Council](image-url)
interconnected industries such as advertising, security, rental car manufacturing and so on. There is an additional component of induced effects that are the incomes from the direct and indirect growth that are spent in the local economy (Figure 2a). (World Travel and Tourism Council, 2013)

In 2013, travel and tourism contributed 128 billion USD to the Indian economy, surpassing sectors like education, chemicals and mining which are roughly the same size as the tourism sector. (Figure 2b) Including direct, indirect and induced impacts, the tourism industry contributed 6.7 percent to the GDP which is a considerably higher fraction than education at 4.3 percent and mining at 3.5 percent. (Figure 3a) In terms of the growth realized in the sector, between 1990 and 2013, the tourism sector grew 273 percent as compared to the expansion of the national economy by 315 percent. It is expected to grow annually by 7.9 percent as compared to the overall economy that is forecast to grow at 7.4 percent. (Figure 3b)

**Employment**

With 39.4 million direct, indirect and induced jobs, the tourism industry contributes 7.6 percent of the total employment in India. Moreover, it has very strong linkages with other industries.
where for every job created in the tourism sector, an additional job is created either indirectly or is induced. (World Travel and Tourism Council, 2013) The revenue capital ratio of the industry is very high where, as of 2002, an investment of Rs. 1 million could create 47 direct and 11 indirect jobs which exceeds the capacity of other sectors like education and communication. (Figure 3c) (Department of Tourism, Ministry of Tourism and Culture, Government of India, 2002)

In terms of the links it shares with other sectors, travel and tourism can induce growth in other sectors, primarily agriculture and wholesale and retail sales with $1 million of tourism sales generating $189,000 and $109,000 in agriculture and wholesale and retail sales respectively. (Figure 4)

Exports

In terms of exports, tourism is a leading sector in the economy, contributing 13 percent of service exports and 4.6 percent of all exports. Between 2000 and 2013, travel and tourism exports grew by 516 percent. Further, the sector is critical since it has one of the lowest rates of import leakage. Import leakage is the cost of imports which must be deducted from the overall contribution of the sector; this is estimated at a low 10 percent for the tourism sector as compared to other sectors and is mainly incurred as costs of importing airline parts. (Department of Tourism, Ministry of Tourism and Culture, Government of India, 2002) (World Travel and Tourism Council, 2013) (World Travel and Tourism Council, 2014)

Social Impacts of Tourism

Socially, tourism can have both positive and negative effects. Among the positive effects of tourism on host societies are an increase in cultural pride and civic honor in the host community; it is one of the best mediums for cultural exchange, to learn about other peoples and places and to promote better global understanding; learning about other societies also brings with it an understanding of other cultures and increased positivity with a reduction of negative stereotypes and perceptions. Tourism on a global scale thus promotes mutual respect, understanding and increased tolerance of other cultures and communities. (Mirbabayev & Shagazatova) For India’s diversity, where each state is akin to an independent country with its own practices, language and culture, domestic tourism can help promote cultural understanding within the country.

Within India, tourism can have a large number of other social impacts. Tourism is an engine for economic growth which in
turn promotes social growth among rural and less developed communities. Rural communities in particular stand to gain from the development of tourism: tourism has large multiplier effects in rural industries like agriculture and handicraft exports which in turn gives rural economies a boost. With national and regional policy focusing on developing tourism in rural communities be it religious and heritage tourism, nature tourism or adventure tourism, rural communities diversify from their traditional, agriculture centered approach. With increasing diversity in employment opportunities, there is increased investment in rural communities in terms of improved infrastructure and services; there is also a significant impact on women and marginalized communities who gain employment and thus empowerment. (Department of Tourism, Ministry of Tourism and Culture, Government of India, 2002) (World Travel and Tourism Council, 2013)

**Environmental Impacts of Tourism**

Being a more service-oriented industry tourism generally has fewer ecological and environmental impacts as compared to other sectors like manufacturing and industry. Trends towards nature and eco-tourism further help preserve and promote environment by increasing investment opportunities in it. Such opportunities might include wildlife tourism, nature, adventure or rural tourism. Eco-tourism in particular aims at developing tourism in a holistic and sustainable manner in order to maintain a dynamic balance between tourism, natural resources and people or communities. (Mirbabayev & Shagazatova) (Department of Tourism, Ministry of Tourism and Culture, Government of India, 2002)
Despite the global growth in tourism from 100 million in 1964 to 700 million in 2001 and an annual growth rate of over 5 percent, India’s share of tourist traffic had stagnated at 0.38 percent of the global share (as of 2002), which is a very small fraction in both absolute and relative terms.

The National Tourism Policy of India, 2002 was designed with the aim of “positioning tourism as a major engine of economic growth and to harness its direct and multiplier effects for employment and poverty eradication in an environmentally sustainable manner”, with policies and initiatives that are “government-led, private-sector driven and community-welfare oriented”. Tourism was accorded the status of a priority sector due to its role in promoting economic growth and employment, increasing tourism related exports and drawing foreign exchange receipts which are important for the country at a global level.

*Broadly speaking, the policy speaks of*

- Focusing on domestic tourism - at 4.6 percent of the estimated global domestic tourism (2001), India’s share is much higher than the share of domestic tourism in other countries as well as international tourism.
- Encouraging sustainable tourism practices to ensure that the industry can sustain in the long run while simultaneously empowering communities.

The policy also cautions against uncontrolled growth in the sector for fear of damaging socio-cultural resources in the country. It lays down the administrative framework for tourism in the country with a designated ministry and a think-tank of policy and decision makers. They are to be supported by communications strategies like a ‘National Tourism Awareness Campaign’, diplomatic strategies like ease of issuance of visas, policies for improving infrastructure and security etc. The policy encourages market research prior to any new development and urges creating a unique ‘India’ brand. (Department of Tourism, Ministry of Tourism and Culture, Government of India, 2002)

*Some of the key strategies outlined in the policy which deserve mention are:*

- The need to promote and improve monuments as a keystone of tourism improvement, to recognize the “carrying-capacity” of protected monuments and prevent undue damage by encumbering the structure with excesses of people.
- Connections should be established with various associated departments including the Department of Civil Aviation, Forests, Environment and Railways. The policy thus promotes an integrated approach to tourism.
- The establishment of tourist police and security services to cater specifically to the needs of tourists. The policy does not however outline the scope of authority that this police service might have.
- Focus on rural and eco-tourism to empower smaller, rural communities and promote economic development and human and women welfare. This is to be achieved by luring urban residents to rural communities and...
concentrating on enhancing not just volume of tourist traffic but also duration of stay and expenditure.

- Other strategies include exploiting India’s coastline by promoting beaches and coastal tourism sites; advertising unique bio-diversity for nature tourism; promoting adventure sports and similar activities to target a younger audience; advertising culinary variety; encouraging the concept of MICE (Meetings, Incentives, Conventions and Exhibitions) in major cities, and promoting traditional Indian remedies and medicines in a unique form of medical tourism.

- The policy establishes the concept of Integrated Tourism Circuits for selected groups of destinations that can be covered under a single route or circuit. These will be aided by the development of road and rail infrastructure that caters exclusively to tourists (e.g. Palace-on-Wheels which is a luxury train targeted at visitors). (Department of Tourism, Ministry of Tourism and Culture, Government of India, 2002)

**Discussion**

The policy does a good job of laying down broad and comprehensive guidelines for state tourism policies: it identifies India’s strengths as outlined above and the steps that would need to be taken to capitalize on them. It identifies transportation, particularly rail, as a weakness that should be developed for effective tourism. Among its more effective recommendations are the promotion of a unique brand which has led to the development of the ‘Incredible India’ brand which is used nation-wide.

One of the main drawbacks of the policy is that it is twelve years old as of 2014 and is hence outdated. The rapidly evolving tourism industry in India needs to be continuously monitored and current challenges need to be addressed with an up-to-date and proactive policy that recognizes and responds to challenges as they develop. Regularly released, annual tourism reports help to identify current challenges that the industry faces and the steps that should be taken in subsequent years; national policy should be updated to reflect these takeaways.

The National Tourism Policy recognizes that the World Tourism and Travel Council’s estimates place India as one of the main centers of tourism growth in coming decades, yet the policy seems to be inward looking in its focus on domestic tourism as compared to foreign tourism. The policy claims that foreign tourists are discouraged from visiting India mainly due to concerns of sanitation and security and yet does not very strongly emphasize the need to fix these but rather suggests that tourism focus on attracting domestic tourists.

Despite laying down the promotion of higher expenditure as one of the central strategies of the policy, associated policies do not reflect this. For example, the charges for entry fees and services at centrally regulated monument and sites are meagre and are unlikely to generate significant revenue unless revised frequently in accordance with changing income levels in the country.
Ancient Monuments and Archaeological Sites and Remains Act, 1958, Updated 2010

The Ancient Monuments and Archaeological Sites and Remains Act of 1958 very broadly lays down the guidelines for declaring something as an ‘antiquity’ and for defining a monument or archaeological site as ‘ancient’ or ‘protected’. It also lays down procedures and laws for the acquisition and maintenance of these properties by government authorities.

The policy spells out the scopes of authorized officials in charge of preservation of ancient monuments and sites; provides the administrative framework for acquiring and maintaining ancient and protected monuments; specifies the procedures to be followed before an excavation or restricted activities like construction and mining are undertaken within a regulated area; lays down guidelines for compensations due to the owner and penalties for violations.

(Archaeological Survey of India, Government of India, 1958)

The 2010 amendment further specifies a few clauses such as what constitutes a construction activity (restoration activities and public works are exempt). The amendment defines ‘prohibited’ and ‘regulated’ areas as those within a 100 meters and 200 meters radius respectively of a protected monument and indicates the nature of activities that may be practiced within these limits. (Archaeological Survey of India, Government of India, 2010)

Discussion

As mentioned previously, the policy lays down an administrative framework: this framework appears unnecessarily complicated and bureaucratic with the process involving sanction from multiple bodies and authorities at the central and state government levels, not including appeals from owners and citizens. Procedural activities are also spread over time-frames of several months, if not years, which adds to administrative complexity and inefficient regulation.

The fines and penalties laid down for violations are minimal; the punishment for most violations is a fine of around Rs. 5000 (approximately $100) with imprisonment for a maximum period of three months. Many offences carry only fines. These penalties when compared to the benefits that can be gained from construction and mining activities are not severe enough to completely deter violations.

Moreover, as discussed by Mr. Mohammed K.K., a former regional director of the ASI (Appendix B), the main problems with tourism and heritage policy is not only with their structuring but also with implementation. In the name of promoting cultural heritage and increasing citizen involvement, some of the policies are overly lenient and thus ineffective.

- Traders are required to acquire non-antiquity certificates for art work and antiques meant for export or trade. They earn several crores of rupees on these deals. To do this, the government utilizes the services of experts and also incurs costs on other administrative
work, but the certificates are issued for free. Mr. Mohammad K.K. recommends that a minimum of Rs. 250 be charged for the issuance of a certificate, a charge that can be passed on to the end customer should the dealer so desire. (Appendix B)

- Although the policy restricts any development within the prohibited and regulated areas around monuments, this is very rarely followed in practice. The ASI is forced to issue non-compliance notices every month for new constructions that spring up around monuments but they are dependent on the police to actually enforce the penalties. Apathy from the police, corruption and other issues result in these very rarely being enforced.

In other words, the potential harms of the policy far outweigh the benefits and this should be considered before formulating or amending future policy. A more effective policy might consider more severe penalties and stricter mechanisms for law enforcement.
Centralized versus Decentralized modes of Administration

A report on World Heritage Sites by UNESCO recognizes that tourism management is a tedious process that requires “clear policies, ongoing dialogue with stakeholders, and constant monitoring”. Heritage sites in particular demand a considerable amount of upkeep with continuous monitoring, regular Environmental Impact Assessments (EIAs) and various other processes for maintenance. (Pedersen, 2002)

Quoting Yuksel, successful tourism administration requires “a process which supports a democratic and transparent participation system in decision-making, promotes greater accountability of institutions to those people they are instituted to serve, improves the availability of information, and optimizes the use of resources by clarifying responsibilities, authority and standards.” (Yuksel & Yuksel)

Accordingly, the key factors essential for effective governance are legitimacy, accountability, institutional pluralism and competency. Legitimacy refers to an active civil society with varied interests that is capable of countering the power of government; accountability refers to the pressure that society exerts on government forcing “good public service performance”; competency is the “capacity which is needed to formulate policies and strategies and to take timely decisions both on the longer term, and on more immediate issues which arise; to implement policy decisions and to manage the delivery of services”; institutional pluralism refers to the presence of multiple institutions representing diverse interests that serve as oppositions in society. (Yuksel & Yuksel)

In the context of tourism administration there are two divergent models – centralized and decentralized. As the name suggests a centralized model has a central agency that is responsible for coordinating all information and resources and allocating functions and funds to development projects. A decentralized administration as defined by Smith is “the delegation of power to lower levels in territorial hierarchy, whether the hierarchy is one of governments within a state or offices within a large-scale organization. Thus decentralization refers to territorially-based delegation not to purely functionally based delegation”. In short decentralization is essentially the transfer of authority from a central authority to subsidiary authorities.

The centralized model is based on the reasoning that tourism, being an industry of national concern, needs to be regulated centrally. However centrally regulated plans are often out of tune with local needs and conditions specific to local governments, for e.g. price disproportionality. This in turn causes an “alienation from participation” i.e. it impacts the choice of local people to participate in their own local tourism and other stakeholder processes. Furthermore access to central agencies like the Ministry of Tourism etc. remains restricted to a privileged, elite few, in addition to which the physical distance to the central
agencies often becomes an impediment to successful implementation and access. (Yuksel & Yuksel)

As opposed to this advocates of the decentralized model highlight the benefits that include

- Availability of up-to-date and local information.
- A sense of pride and responsibility that is inculcated in field level personnel which helps them play a greater role in the management of their own tourism. It also indirectly results in a greater participation from local people.
- Reducing central workload will ensure that more time is available for planning strategy and designing effective policy.
- Enhancing legitimacy, perceived fairness and accountability of local government in the eyes of the public.
- Greater political stability as a result of education and training in political leadership. Political debate is encouraged and masses develop skills in policy-making. Political stability is strengthened through participation in formal political processes which increases faith in the administrative system.
- Political equality because there is less of a concentration of power and greater participation
- Better accountability since representatives are more accessible to the public and can be held responsible for the policies they frame and their subsequent outcomes.
- Improved responsiveness of government because local representatives are best placed to know the exact nature of local needs and how they can be met in a cost-effective way. (Yuksel & Yuksel)

### Monument maintenance is a fragmented approach

Crook and Manor (1994) demonstrate that some countries, such as India, have benefited from the practice of decentralization. They suggested that in India, decentralization has resulted in a clear division of responsibilities between central and local government. Through India’s decentralization policies, community needs have been taken into account better and benefits have sometimes been channeled more effectively to vulnerable groups. Other achievements have included greater effectiveness in project delivery, the mobilization of local resources and improved horizontal co-ordination. In addition, political awareness has been created among local residents, and better information gathering networks have been established in local constituencies which reinforces the basic tenets of legitimacy and accountability. Through decentralization, the completion rate of local projects has increased and the distribution of resources in localities has sometimes become fairer. Decentralization has also prompted an increase in the institutional response to the problems identified. (Yuksel & Yuksel)
Variation in the type and nature of tourist places and heritage sites in Hyderabad necessitates a division of responsibility among various supervisory and regulatory authorities. Ideally this division would be based on the nature of the place - a monument, historic district, park etc., - and the scale of maintenance activities that would be required for the upkeep of the site. Hierarchical flows between organizations and improved coordination would help establish different scopes of authority and introduce a sense of accountability for site maintenance.

This however, is not the case. The approach to maintenance of heritage sites in Hyderabad is highly fragmented with authority being delineated in a haphazard fashion. The following section attempts to outline the scope of authority of different regulatory authorities and discuss why the current division of responsibilities is inadequate.

**Archaeological Survey of India**
The Archaeological Survey of India (ASI) is the apex body of the central government responsible for the regulation and upkeep of sites of national or international relevance. The sites deemed suitable are not less than a 100 years old and are selected based on certain criteria defined by the Ancient Monuments and Archaeological Sites and Remains Act, 1958 and evaluated on a case by case basis. (Archaeological Survey of India, n.d.)

Within the city of Hyderabad, ASI is responsible for two monuments in their entirety: the Charminar and Golconda Fort. They manage the site, hire staff, and earn any revenue generated from commercial activities within the site boundaries. Further, according to ASI provisions, they ensure that all mining and construction activities are prohibited within 100 meters of their monuments and further, construction activities are restricted within a 200 meter radius of the site.

**State Department of Archaeology**
The State Department of Archaeology is a research institution responsible for state level control of archaeological sites and monuments. The Andhra Pradesh State Department of Archaeology has 28 monuments within the city of Hyderabad under its control and is responsible for conducting exploration, conservation and preservation activities at these ancient sites. They also attempt to establish museums in all Andhra Pradesh district headquarters with a view to educating people. (Vottery, 2010) The number of sites taken up by this body is very few compared to the number of sites that actually exist and require active conservation efforts. On the plus side, the State of Andhra Pradesh is one of the few states (approximately ten) that have policy documents in place for heritage preservation and promotion. (Archaeological Survey of India, n.d.)

**GHMC (Greater Hyderabad Municipal Corporation)**
The municipal corporation is responsible for revenue collection and infrastructural activities within the bounds of the city of Hyderabad. In terms of heritage sites, their scope of authority starts at the outer wall...
of the site i.e. they are responsible for access and maintenance of areas around the site but don’t control any activities within the site. They also regulate the provision of support facilities like electricity and water to the sites as they do to all other properties. The heritage cell of the GHMC plays a limited role in identifying and promoting heritage sites but they lack the authority to effect any change within the boundaries of the site. Being the revenue arm of the city’s government, they are also involved in sanctioning heritage sites and structures for adaptive reuse and implementing policies which provide financial support to site owners in terms of tax subsidies and rebates.

HMDA (Hyderabad Metropolitan Development Authority)
Formerly the Hyderabad Urban Development Authority (HUDA), the Hyderabad Metropolitan Development Authority (HMDA) is the town planning authority of the city government and the only body that maintains a list of heritage sites in Hyderabad. These are classified into six heritage precincts and 137 heritage buildings. These buildings in turn are graded based on their historical value and the extent of permitted structural changes. In terms of management, they may be managed by the ASI, by the State Department of Archaeology, Trust Funds or private ownership. Several structures continue to be owned by the government but due to a lack of funding, they have suffered degradation over the years. Although several structures come under the government, the metropolitan authority does not actively participate in their maintenance but instead focuses its efforts on public parks, gardens and similar public spaces.

Buddha Purnima Project Authority (BPPA)
An arm of the HMDA, the BPPA restricts its activities to parks and public spaces around the Hussain Sagar Lake area, specifically Hussain Sagar, Lumbini Park, NTR Gardens, Necklace Road, Peoples Plaza, NTR Memorial, Sanjeevaiah Park, Lake view Park, P.V. Gyan Bhoomi, etc. which double up as tourist attractions; they do not typically take charge of other tourism related public spaces. (Understanding Hyderabad City: Differences Between MCH, GHMC, HUDA, and HMDA, n.d.) Their role involves maintaining the site, promoting tourism, entertainment and other activities in this zone.

APTDC (Andhra Pradesh Tourism Development Corporation)
Andhra Pradesh Tourism Development Corporation is the main body responsible for tourism infrastructure in the state. They plan for the expansion of tourism and for tourism related construction and infrastructural activities such as the building of government resorts, development of eco-tourism tracts etc. Operation of these activities is under AP Tourism.

AP Tourism
AP Tourism is the commercial arm of
APTDC that is responsible for operating and controlling all the commercial ventures of the APTDC. They are dependent on APTDC for certain sanctions but being a highly profitable enterprise, they are able to function in a more-or-less autonomous capacity and with little regulation from the government.

**APSRTC (Andhra Pradesh State Road Transport Corporation) and MMTS (Multi-Modal Transport System)**

APSRTC and MMTS responsible for road transport and suburban rail in the city of Hyderabad are completely independent of the tourism administration and as such receive no input from them with regards managing transport systems to suit tourist needs or to specifically serve places of interest.

*This disjointed approach has harmed cultural heritage*

This lack of organization has led to several episodes in the past few years of gross mismanagement of cultural resources in the city. Weak policies, feeble implementation and a lack of public awareness have led to a loss of several invaluable heritage resources. “Diwan Devdi, the house of the Salarjung family, was allowed to decay; palaces of great nobles were sold to make way for housing colonies; sometimes, even road widening became a demolition drive.” (Vottery, 2010)

In an instance two years ago, the state department of archeology along with a few private parties started digging up a site around a 100-year old historical structure in search of “treasure”, based on information received from a high-ranking official’s son who had received word about a hidden staircase. (Rao, 2012) Aside from the fact that they were unable to find anything, what is of concern is the manner in which they were able to initiate such a search without sanction through any relevant channels or approval process. By virtue of the influence exercised by the official, he was not held accountable for his act. Had there been a mechanism in place to verify such information and choose whether or not to act on it, the official might have been found in violation, which in turn might have checked such action.

In yet another incident, nearly 20,000 antique items from the Qutb Shahi period, including guns, armor, and weaponry that were stored in the Shamseer Kotha were found stolen. The building, under the control of the State Department of Archaeology was previously used as the armory during the Qutb Shahi period and currently as a storage space for a number of historical valuables. Despite this, the lack of sufficient manpower means that the building is not guarded at night by any security and some reports claim a lack of security during the day too. The lack of a proper inventory or records of the artifacts meant that the investigation was delayed by several days, in addition to which they were not able to determine the extent of theft. (Ifthekar, 2012) (19,868 articles missing from Shamsheer Kotha, say officials, 2012) Newspaper articles that covered the incident reported that
authorities were pointing fingers at one another with none, including the police taking required action to recover the articles. A lack of resources along with a heavy dose of apathy are likely responsible for the occurrence. Combined with the lack of accountability and public awareness the department will, in all probability, get away with such issues of negligence in the future too.

Restructuring of the roles that these bodies play is also essential from the point of view of finances. Despite the role that the GHMC and HMDA play in relation to site maintenance, they get little of the revenue from tourism. The revenue generated, mainly from entry fees is disbursed directly to the regulatory authority, be it ASI, the State Department of Archaeology or a private body; with little to gain in terms of revenue, there is little incentive for the municipal corporation or metropolitan authority to promote tourism. Further, there has been considerable tension in the past between the HMDA and GHMC regarding distribution of finances which does not bode well for the tourism industry. (Singh, 2014) Entry fees in turn are so low that regulatory authorities such as the ASI or State Department of Archaeology at each of these sites are strapped for funds and are forced to compromise on security, maintenance and services offered. This has been discussed in the following section.

This division of power and authority needs to be restructured to better delineate responsibilities and introduce accountability.

**Schemes in Place for Heritage Preservation**

The GHMC has enacted several policies to help promote the preservation of heritage structures. (Appendix B)

**Classification of Sites**

In order to determine the extent of change that can be enacted on a site, a three-tier classification scheme has been adopted. This classification scheme helps owners determine the permitted alterations they can make to their property. Very broadly speaking, the three grades defined are:

**Grade I** – No changes allowed, not even minor; these are reserved for the oldest and most historically significant sites which need to be preserved as is.

**Grade II** – Repairs and minor changes that are in harmony with the existing site.

**Grade III** – More major changes allowed including construction of new blocks etc.

**Funding, Tax Waivers and Development Rights**

Many heritage sites are a burden and liability on their owners due to the restrictions placed on them against alteration or commercialization. In order to help such property owners maintain and prevent the decay of these sites, the municipal corporation provides various funding alternatives and tax benefits as described below:

- The GHMC waives up to 75% of the property tax for private owners of heritage sites so that they are able to afford and maintain the site.
For those owners who would like to renovate their property, the government funds up to 20 percent of the estimated costs or Rs. 25 lakhs ($50,000), whichever is lower. Property owners however need to make the payments initially and upon submission of the bills, will be reimbursed for the costs.

The restrict demolition of sites to only those that are a safety hazard. The Jawaharlal Nehru Technological University is the authority that evaluates proposals for construction or demolition of sites and gives sanction. Only in the event of a site being impossible to restore and a safety hazard to the public will demolition be sanctioned.

For sites with low Floor-Area-Ratios (FAR) where property owners are concerned about incurring losses, the GHMC awards Transfers of Development Rights on a case by case basis, allowing owners to develop properties elsewhere instead of changing the heritage site significantly.

**Adaptive Reuse**

The government also leases out heritage buildings for adaptive reuse for a variety of purposes. There are currently many such buildings in Hyderabad such as the Falaknuma Palace which functions as a hotel run by the Taj Group, or the historic Victoria Memorial Home which was donated to an orphanage which currently runs a school and orphanage there presently. (Figure 5)

**Public Private Partnerships**

The GHMC also offers opportunities for public-private partnerships (PPP) to promote tourism and heritage preservation by collaborating with non-profits and private companies.

Some projects that have been realized using the PPP model include the restoration of the Qutb Shahi tombs by the Aga Khan Foundation where they are given restoration rights although the property is still owned by the government. Other privatization projects include Snow World where land is given to a private

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**Figure 5 (a) The Falaknuma Palace which is now a hotel run by the Taj Group (b) The Victoria Memorial Home which is doubles as a school and orphanage**

*Source: tripadvisor.co.in; Google Plus*
party for 33 years under a build, operate
and transfer mode. Apart from the rent
and taxes, the government also gets 2
percent of the revenue (fixed rate for any
kind of development) and the contract is
renewed if all the rents and fees are paid
on time.

Discussion
While the schemes in place for the
preservation of cultural heritage are
comprehensive, the main problem they
face is with implementation. With rampant
corruption and administrative difficulties,
it becomes very difficult for the right
people to receive funds and waivers and in
their entirety. This in turn deters owners
from taking up development activities,
choosing instead to allow the property to
deteriorate.

Other improvements that might improve
heritage preservation include providing
benefits in accordance with the grade
assigned to the monument, for example, a
Grade I monument where minimal changes
are allowed and which would therefore be
a greater liability to owners could be
offered more tax benefits as compared to a
Grade III structure where the owners are
allowed to develop to a greater extent.

Social Responsibility
Apart from these several NGOs and
government officials working in the
tourism and heritage preservation sector
also take up social development in tandem
with their work.

Mr. Mohammed K.K. while working as the
Regional Director of the ASI in New Delhi
worked towards establishing schools in
the slums around the Red Fort and Qutb
Minar and distributing blankets and warm
clothes to impoverished families at highly
discounted rates. This initiative was
appreciated by diplomats from the U.S.
including President Obama during his visit
to India; Indian authorities however
continued to condemn it reasoning that it
showed India and its poverty in a poor
light. Despite the criticism, he believes that
urban renewal should be a cornerstone of
tourism development and hopes to
continue similar work under the Aga Khan
Foundation in Hyderabad.

Along with their restoration activities at
the Qutb Shahi tombs, the Aga Khan
foundation is also looking into partnering
with the surrounding community. The
community in the Golconda area is very
conservative with several people still
following the burqa system and where
women are still very backward. He hopes
to involve the community by encouraging
their employment in heritage and tourism
developments. They are also in talks with a
few local hospitals in the immediate
Golconda area which need infrastructure
including generators for their operation
theatres; the Aga Khan Foundation hopes
to sponsor a part of the funds required for
the installation of such necessities.
Differential pricing schemes are not very effective

The pricing schemes at the tourist sites are largely ineffective for a number of reasons as discussed below:

Firstly, there is a considerable amount of variation in the prices charged among different historical sites in Hyderabad. The amounts charged are inordinately low and easily affordable by many which encourages repeated visits by locals among other tourists. The token amount which does not even cover the costs of site maintenance, let alone generate a profit, is structured to supposedly inculcate a sense of public ownership of these heritage sites and discourage entry for vandalism. Arguably the most important historical monuments in the city, the Charminar and Golconda Fort, which are central government managed have the lowest costs of entry at Rs. 5 ($0.08) per person for Indian nationals while other places of similar historical value, but managed by a private trust, charge much higher amounts e.g. the Chowmahalla Palace which charges Rs. 40 ($0.4) per person for Indian nationals. The Golconda Fort which is managed by ASI and which charges a fee of Rs. 5, also hosts a sound and light show that is managed and run by AP Tourism with due permission from the ASI. Per person charges for this show are Rs. 150; although not unaffordable for many, it is grossly disproportionate as compared to the entry fee of Rs. 5 and reiterates the previously expressed opinion on poor inter-agency coordination. Further, the prices for carrying a camera inside are disproportionately higher at Rs. 50 per still camera or Rs. 100 per video camera while most places allow mobile phone cameras free of charge. Such a pricing scheme is both inconsistent and ineffective. Entry fee differences are likely to cause disparities in the numbers of tourists who visit as well as the relative popularity of the place. Additionally, with the advent of technology and every person owning a mobile phone with camera, there is a considerable loss of revenue from not charging these visitors.

Secondly, there is a vast price difference between that charged to local people and that for foreigners, a measure which is meant to account for the income gap and higher affordability of foreign visitors who come from richer countries. For instance, the entry rates for foreign visitors at the Golconda Fort and Chowmahalla Palace is Rs. 150 each, i.e. 30 times and 3.75 times the amount charged to domestic tourists. This scheme however seems to be highly unpopular among foreigners and locals alike: while only one foreigner commented on the unfairness of such differential treatment (from the surveys, Appendix A), a number of domestic tourists believed that overcharging foreigners was unjust and inhospitable and would have instead liked to see foreigners get treated the same way as locals. This bid for equal treatment includes not just entry fees but prices charged by auto-rickshaw drivers and salespeople. This finding has also been noticed in previous studies such as one in Cape Coast Castle, Ghana where foreign visitors expressed their dissatisfaction with entry fee differentials for local and foreign visitors. (Austin, 2002)
Thirdly, these sites generate very low revenue from commercial activities like film and advertisement shootings, commercial photography etc. A standard rate as fixed by the central government for filming charges is Rs, 5000 ($82) per shoot with the aim of promoting India’s cultural heritage through films and media. Film budgets run into tens of crores of rupees (1 crore is 10 million) and Rs. 5000 is in comparison a pittance. These sites are thus losing out on revenue which can be very easily tapped by a reassessment of these pricing schemes.

Steps in this regard have previously been attempted but have been dismissed by the central government under which the ASI falls. Mr. Mohammad K.K. who retired as the regional director of ASI, North India had previously proposed a modified scheme for increased commercialization of all monuments under the authority of ASI. The report encouraged public-private partnerships as a means to encourage commercial activities at heritage sites and market them better. Based on various studies, it also proposed prices of at least Rs. 50 (if not more) for World Heritage Sites and at least Rs. 25 for all other sites; film shooting certificates currently valued at Rs. 5000 per shoot should be modified to Rs. 1 lakh an hour. Other proposed changes include increasing the costs of antiquity certificates and increasing the amounts charged to traders of antique and cultural items. All these changes were however rejected and are normally re-evaluated only once in every ten to fifteen years.

**Positives and Negatives of Modifying Entry Fees**

Several studies have evaluated reasons for particular pricing structures at heritage sites as well as the pros and cons associated with them. Several considerations need to be taken into consideration when determining an effective pricing program for these sites, not merely the ability of visitors to pay but also the effect that it might have on the structure and the visitors’ experiences.

A study conducted in Changdeok Palace in South Korea attempted to assess the use-value of a World Heritage site using the Contingent Valuation Method (CVM); they found that on average people’s Willingness-to-Pay (WTP) was almost double of that actually charged without any significant impact on visiting behavior. This varied with different factors such as the income and the age of the user with higher income users being more willing to pay while older people were more resistant to a pricing change. (Kim, Wong, & Cho, 2007)

A study in Ghana found that people’s response to entry charges also varied with their perceived emotional connection to the heritage site. For example, African Americans felt a stronger emotional connection to a site where slaves were housed historically and consequently protested higher entry fees believing it to be a part of their cultural heritage, which they shouldn’t be charged for. Caucasians in the same study were not as emotionally affected and were concerned more about the unfairness of differential prices between them as foreign visitors and the

**Pricing and Equity**
local population. (Austin, 2002) These are factors that would need to be considered when creating a pricing change in a heritage-rich Hyderabad. The local people are likely to feel a greater emotional connect to these sites which might impact their willingness to pay a considerably higher entry fees. Similarly, foreign visitors are likely to feel unwelcome when they are charged substantially higher rates.

Equity concerns would also determine the fairness of pricing. Being a country of substantially lower income as compared to western counterparts, people have lower disposable incomes and reduced ability to pay for such recreational and quasi-educational activities. An argument that advocates of free entry put forward is that people shouldn’t have to pay for an educational experience or that cultural heritage should be a free commodity that all people can partake of. Having said that, some studies also believe that not charging for such experiences is tantamount to assigning them no value and that a charge commensurate with the expected value of the experience should be charged. (Austin, 2002)

Protecting vulnerable heritage sites against wear-and-tear by moderating the number of visitors and reducing people-induced stress on the structure is yet another argument in favor of increasing prices as is practiced at the Stonehenge in England. (Austin, 2002) This is true of many heritage sites in Hyderabad which already witness overcrowding to the point of causing discomfort to fellow visitors (from surveys) not to mention undue stress to the monument. For example, in 2010, a chunk of the Charminar fell off the structure which later studies attributed to excessive traffic and people at the monument. (Portion of Charminar minaret falls, 2010) Moderating the number of people who visit the site is thus essential and could possibly be prompted by raising the entry prices to the monument.

For heritage monuments in Hyderabad, the potential benefits of modifying entry fees are multi-fold:

- Assuming that the increase in charges falls within people’s capacity to pay, the higher charges are likely to generate higher revenues which can be invested in better site maintenance, security and provision of services;

- Modifying the fee structure will also help eliminate (or reduce) the current gap between the fees charged at different sites and between foreign and domestic tourists;

- Raising fees can also be used as a crowd management strategy to deter people from visiting the site and reduce stress on the monument.

On the flip side, the potential negative effects should also be kept in mind:

- Drastic changes in people’s behavior patterns and large reductions in the number of visitors might actually reduce the revenue generated from charges instead of increasing it;

- Equity should be kept in mind when structuring fees such that even low-income people find it affordable to visit
these heritage sites

- Public resistance to hiking the prices and the emotional connect of local people to their heritage must be kept in mind when implementing such changes. Incremental changes and in a staggered fashion might be more palatable overall.

- In order to minimize the potential adverse effects of price changes, more detailed studies and surveys need to be undertaken, specific to Hyderabad, to determine the prices that people are willing to pay for access to heritage sites.

**Equity**

Equity concerns are one of the main issues with tourism development in a community and any proposed pricing changes. Equity concerns arise due to several reasons and concerns, all of which must be given due consideration before formulating or modifying policy.

**Differences in incomes and affordability**

Particularly in a country like India which is still developing and sees large variations in income, differences in income are a very real concern. While raising prices and promoting commercialization of monuments and sites might be a desired strategy to generate revenue from tourism, affordability of lower-income classes should also be kept in mind. Heritage sites are public property, maintained for with tax money collected from citizens; it can thus be argued that it becomes citizens’ right to enjoy the benefits of these public places. Imposing heavy entry fees that dissuade the public from visiting can be considered inequitable.

On the other hand, a fee structure that is more affordable will attract a wider income demographic, which in turn causes overcrowding and stress. Therefore pricing structures should be balanced with these two opposing forces to reach one that is neither cost-prohibitive nor unreasonably discounted. Further, fee schemes need to be reevaluated frequently to reflect the rapidly changing economic conditions, instead of the reevaluations that take place only once in ten to fifteen years.

**Effects of mass-tourism: Stress on infrastructure and public amenities**

Another equity concern that arises from growth in tourism is the increased stresses that are placed on civic amenities and public infrastructure due to the influx of people. Mass-tourism leads to “over-consumption, pollution and lack of resources”; often at great cost to local populations. (Mirbabayev & Shagazatova) One of the common resource shortages that is seen as a result of mass-tourism is a water shortage; this has been found to occur in other Indian states like Goa and Kerala which have high tourist populations. The limited water resources are consumed by high-end hotels which can afford to pay, or for other service providers like water sports leading to
fewer resources available for the local population. (TourismConcern, 2012)
Similar resource shortages of other public utilities like water and electricity can arise
due to the increased demands by tourists. Tourism should thus be developed in an
equitable manner to ensure that growth in public resource provision can meet the
increased demands of larger numbers. In other words, tourism growth should be
controlled to ensure that it occurs in a sustainable manner that does not compete
with or compromise on the ability of local populations to reach their potential.

*Cultural identity and perceived sense of ownership of the city and site*

Another angle to equity is the sense of cultural identity and ownership that locals
might have compared to outsiders or visitors in the community. Locals might thus perceive a greater sense of ownership
and therefore demand greater advantages as compared to outsiders such as reduced
entry fees and access to a greater variety of facilities and services. This sense of
ownership could be encouraged and capitalized on by balancing the advantages offered with civic responsibilities
demanded of the citizens. For example, citizens could be encouraged to participate in all matters related to heritage
destination and preservation; clean up drives and similar initiatives to promote better sanitation practices and civic sense.
Employment & Public Participation

Factors affecting Recruitment and employment

Employment in the tourism industry often occurs through informal networks and channels. This section attempts to discuss current employment practices in the industry, particularly Hyderabad, and suggest suitable interventions to increase efficiency.

Societal stigmas restrict employment

A study by the City and Guilds Centre for Skills Development published a report that identifies issues and difficulties with recruitment and employment in the Indian tourism sector. The study conducted across several lodging facilities identified impediments to finding the most-effective task force in the industry. The most common social concerns were caste-based disputes; discrimination and stigma against women in the industry due to safety concerns, perceptions of promiscuity and domestic demands; differences in expectations between employees and the organization. (Gale, et al., June 2013)

Further, the still developing industry has a flourishing informal sector that includes amongst others, lodging, tour guide services and rental facilities; recruitment in these areas predictably also occurs informally. While an advantage of this system is that employers seek to save on recruitment costs and hire locally, - word-of-mouth being the common recruitment strategy - it has resulted in hiring occurring within restricted social circles and classes. (Gale, et al., June 2013) This informal sector has been discussed in another sub-section.

Employee shortages plus leniency results in poor job performance

Another issue that impacts job performance is the difference in the expectations of employers and employees, with the latter often giving priority to their personal responsibilities over their professional commitments, often leading to compromises on punctuality, attendance and so on. (Gale, et al., June 2013)

The tourism industry in Hyderabad faces similar difficulties. One of the main problems they face is a shortage of staff especially at key locations. Further these people are subjected to frequent transfers i.e. every 3-4 years to other monuments and other cities, an issue that often poses domestic challenges for them. However, they also enjoy a great deal of job security with the government very rarely laying off people and instead choosing to transfer them if they do not perform satisfactorily. This suggests that despite personnel shortages, the government chooses to retain less-than-competent staff which further challenges maintenance efficiency.

Gap between formal training and industry requirements.

Business owners also harbor the perception that formal training establishments impart outdated and irrelevant information. Further, these training institutes do not lay adequate focus on soft skills such as communication and confidence. Poor soft skills are in fact major obstacles in the path of career advancement, since the ability to communicate effectively, particularly in English, is deemed essential for people
placed in higher positions i.e. those who interact directly with their clientele. (Gale, et al., June 2013)

An example that highlights this deficiency is that of an auto-rickshaw driver, Javed Khan, who also runs an independent tour guide service. Although his English is weak, he says that it is enough to get by, and that this knowledge of English gives him a definite advantage over other such independent guides. (complete transcript in Appendix B)

Lack of suitable training institutes also means that people without formal training and education are hired and trained on the job; on the plus side, this saves for potential employees, the costs associated with formal degrees. (Gale, et al., June 2013)

**Role of Training Institutes**

The growth of training institutes for the hospitality industry has seen a sudden surge in recent years. There are State Institutes of Hospitality at Medak, Tirupati and Nellore (all within Andhra Pradesh) and a branch at Gwalior.

In order to address gaps in training for the hospitality industry, the state department for tourism established the National Institute of Tourism and Hospitality Management in 2004-2005 as an institute to train the people of Andhra Pradesh; further, recognizing the absence of an institute for culinary arts, one has been established in Tirupati.

**National Institute of Tourism and Hospitality Management**

The National Institute of Tourism and Hospitality Management (NITHM) was set up in 2004-2005 by APTDC with the aim of helping in making tourism an organized sector by supplying professionals. The institute is jointly administered by the NITHM management, APTDC which is given executing authority, Shilparamam, and the Department of Tourism.

They offer a number of academic programs such as MBA, BBA, Hotel Management, B.Sc. etc.; short courses or training programs in topics like food production, servicing, housekeeping in hotel management, specialized guide training in archaeology, nature; and opportunities for research and consultancy with APTDC and other concerned agencies on topics related to rural tourism, promoting indigenous handicrafts and so on.

Apart from the main intake of people with a high school education, the institute targets a wide audience of people and from different backgrounds: a number of the short refresher courses are targeted at mid-career professionals, while shorter one and two day courses in skills like cake-making might be targeted at homemakers or software professionals. The government of India has been trying to provide alternative career options to those who have had a limited options for study in the past e.g. by providing free and reduced cost programs for those who are only 8th pass and those less than 28 years old. Further there is a 15 percent intake of foreign students from African countries, Afghanistan and Bhutan (mainly) to increase student diversity.
The state of Andhra Pradesh gets a locational and therefore, a recruiting advantage. A number of national and international companies such as Thomas Cook, Kouni Corporation, IRCTC, Mohan Lorry, GMR (Hyderabad International Airport) recruit students from the institute.

**Informal Network**

In conversations with various staff in the tourism departments and offices, there are few who acknowledge the presence of an entirely informal network in tourism that is integral to the efficient functioning of the tourism network and probably leeches a large portion of the tourism economy.

**Functioning of this informal network**

The functioning of this informal network was gleaned from Mr. Javed Khan, an auto driver and guide, who offered a description of this informal tourism network in Hyderabad: how the network is organized, how it operates, and the relationships between the different integral participants. (Appendix B)

An informal sector and network is pervasive in all sections of the tourism industry be it accommodation and lodging, transportation, or shopping and services. They work distinct from government intervention and control to the extent that they work despite government regulations to the contrary.

Auto-rickshaw drivers are a large segment of the service providers in this sector who manipulate auto meters and overcharge customers in order to earn more despite the municipal government imposing strict tariff structures. They have arrangements with the police and other law enforcement authorities who they turn a blind eye to the overcharging in return for bribes. They however face problems from other drivers where they organize themselves into specified territories to which they are restricted; in the event that an auto-driver from another area of the city try to run his auto in another territory, he is forcibly removed often through the use of violence; the police turn a blind eye to this also which makes it very difficult to break out of the system.

Some auto-drivers work as tour guides as an additional source of income, particularly during the peak season from May to July and December to January. They have an internal arrangement among themselves and distribute earnings among themselves informally. In the process of guiding, they have learnt to cater to different demographics and income brackets and charge different amounts depending on group size, whether they are local or foreigner and how much they think their client can afford to pay.

In order to promote their guide services, they have tie-ups with smaller hotels and lodging facilities that have sprung up around the city, particularly railway and bus stations which offer lodging for much cheaper rates (around one-third of those that are advertised online). They bring customers to these hotels in exchange for a small share of the profits; these hotels in turn advertise their guide services to the guests. The hotels save costs of advertising and cater to a different demographic that is looking for functionality rather than high
-end services. Owners of these hotels are dependent on this informal network to get a regular stream of customers while these auto-drivers are responsible on the hotels for the advertising of their guide services.

There is thus a lot of inter-dependency in the network. Loyalties and unofficial agreements between various inter-related parties govern the functioning of this system and disrupting even one stakeholder’s participation might impact the entire system and trickle down to hamper tourism in the entire city.

**Improvements and Recommendations**

It is imperative that tourism authorities recognize the role that this informal network plays in promoting and maintaining tourism in the city. Despite the fact that a large number of practices of the informal sector occur outside the traditional bounds of law, consideration should also be given to the fact that it is a highly efficient system. The competition between various factions and their symbiotic manner of functioning serves to bring down prices, which in turn makes tourism more affordable to lower income groups. Developing this sector effectively would therefore require deliberation and thought. The aim should be to iron out some of the less acceptable practices but encourage the more effective ones by removing barriers to their functioning.

† Authority here is wielded very shrewdly, with the police using their power to make difficult the lives of the people functioning in this sector. Tourism authorities should thus push for effective checks to the police power to allow for more effective functioning of the sector. An effective police would be key to checking some of the more controversial practices in the industry such as the violence between groups, drug and prostitution rings and so on.

† Despite the prevalence of this very large and organized informal network, they get very little recognition or support from the government. For example – though cooperative banks have been set up to help facilitate small businesses e.g. those wishing to purchase their own auto-rickshaws, beneficiaries have to make repeated rounds of the cooperative banks and more often than not, work never gets done. Further, although monthly income is decent, owning a house or apartment is very difficult due to high property rates. However, after the government has locked the lending rates of private financers, getting funding from them has become more hassle free. The previously charged interest rate of 1.5 to 1.7 percent has since been reduced to 1.2 percent, thus making borrowing from them better and easier. Similar policies that work towards removing barriers to ownership and instead providing assistance to help people buy their own property be it an auto-rickshaw or house would also help reducing penury and hardship among these people.
**Literature Review**

The development and maintenance of tourism infrastructure “which services the need of the tourist and encourages development in the sector” is necessary for the growth of the industry. (Karim, 2011) Development needs to take place synergistically in both the private and public sector with investment from both fronts necessary for the overall growth of the sector. The public sector is typically responsible for policy formulation; planning and developing key infrastructure like transportation and sanitation; protection and maintenance of landmarks and historical sites; prescribing standards for environment and public health policies. On the other hand, the main activities of the private sector include adequate development of other facilities like accommodation and lodging; travel agencies and private tour services; marketing, advertising and other commercial activities. (Ionel, 2013)

Synergy is required between the two in that public sector policies and activities should ease private sector investment in the right direction to help address shortcomings of the existing tourism scenario.

Ionel proposes certain essential elements of successful tourism infrastructure: (i) Accommodation and catering structures to house tourists; (ii) Elements like landscape, culture and history which increase the attractiveness of a location; (iii) Communications infrastructure which includes transport and telecommunications; (iv) Civic elements like hospitality, civic education and aesthetics; (v) recreational and leisure facilities such as sports complexes, art fairs etc. (Ionel, 2013)

Aside from the system of governance and administration in Hyderabad, infrastructure facilities are factors that will determine the quality of tourism in the city. A survey (Appendix) of visitors and tourists in the city was used as a starting point to identify the main problems with the quality of tourist infrastructure in the city; this was combined with input from various tourism officials who describe the challenges they face in implementing suitable changes. Apart from public input and opinion in the form of the survey, a personal assessment conducted during the site visits was also used in assessing infrastructure and suggesting suitable interventions.

**Transportation Infrastructure**

Transportation both to and within the city are essential to increasing the attractiveness of Hyderabad as a destination. Being a major metropolitan area in India, Hyderabad is very well connected both domestically and internationally via air, rail and road transportation. Internally however, the transportation system can do with a number of improvements which have been discussed further.

**Public Transportation**

Public transportation in the city is inadequate, compelling commuters to use personal vehicles or relatively unaffordable means like auto-rickshaws and taxis. Low public transit usage
combined with metro rail construction activity currently taking place city-wide has resulted in severe traffic congestions and unduly long travel times between destinations. To redress this, effective and improved public transportation needs to be developed, particularly to locations of tourist interest. Some aspects are discussed below.

**MMTS (Multimodal Metropolitan Transport System)**

Contrary to what the name suggests, MMTS consists of only a suburban rail service of two lines that serve the twin cities of Hyderabad and Secunderabad: one of which runs between Lingampally and Falaknuma and the other which runs between Lingampally and Hyderabad. A few suburban routes run infrequently. Despite there being only two lines, the service area covers a number of points of interest and could thus prove to be an effective mode of public transport if planned prudently. Despite stations being located at strategic points (for example, right opposite Eat Street at Hussain Sagar, a popular tourist haunt) the number of people using the service is negligible because of the following problems:

- Lack of coordination with other modes of transport:

A key issue identified with the MMTS system was the lack of proper directions and information about locations of stations and rail lines, which is a major problem for non-locals. Despite being advertised as a multi-modal transport network, the suburban rail system functions in isolation to other modes of transport. Stations are situated in random locations that are not immediately obvious to someone unfamiliar with the city and there are no signboards with suitable directions. Signboards in different languages need to be strategically placed to assist both local commuters and visitors. Some stations

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Figure 6: MMTS timings for the Lingampally-Falaknuma Line which shows that the trains ply at a very low frequency of less than once every half hour.  

Source: www.mmtstraintimings.in/
such as the one at Hi-Tech city is located under and across a busy flyover which is not accessible to pedestrians easily. Such designs mandate multi-modal connectivity. Ideally, bus stations and auto-stands meant for shorter distance travel should be located in close proximity to the rail stations so as to promote multi-modal trips. The use of 2 wheelers to access inconveniently located stations can be encouraged if stations housed convenient, covered, two-wheeler and bicycle parking.

♦ **Unreliable service with poor frequency**

One of the other issues identified with the MMTS was the unreliability and poor frequency of service. (Figure 6) Despite commuters being concentrated only along the two routes that the MMTS serves, the periodicity of trains is normally around once every half hour which means very long waiting time between trains. Further, the trains do not run in accordance with pre-specified schedules and are frequently delayed or cancelled, which makes it a highly unreliable option for most commuters. Although published in print, train schedules are rarely actually available at stations when requested. The lack of popularity of this mode can be seen from the low numbers of commuters even during morning and evening peak hours.

♦ **These trains however have a lot of potential since they are exempt from issues that other modes face**

They are exempt from issues that other modes face and are by far the cheapest and fastest mode of commute within the city, particularly for longer cross-city distances which can take up to two hours in peak traffic and all for a meagre fare, often less than Rs. 10 ($0.20). There were proposals underway to expand the current MMTS line to serve other corridors but these have been indefinitely postponed due to various administrative and legal difficulties. (Times of India, 2014)

**Metro Rail**

The metro rail network seeks to redress some of the deficiencies in the MMTS system by providing a comprehensive, interconnected network with strategically located stations for mass transit. Although the lines are still under construction and are due to open only by mid-2015, it is expected that the service will dramatically change the landscape of Hyderabad mass transit. Routes are well planned and are located to supplement, rather than replace the MMTS service. Additionally they are integrated with other major modes of transportation such as bus hubs and train stations thereby facilitating multi-modal connectivity. From a tourist’s perspective, the metro connects most places of interest in Hyderabad and promises modernization and increased efficiency of the system. (Figure 7)

Metro construction has however severely hampered movement in the city since the last few years: road closures, detours, makeshift bus stands and other inconveniences are widespread. Aside from traffic chaos, metro rail construction activity has also caused extensive air pollution in the city with recent estimates placing the particulate matter concentration from 2012-2014 at 45 percent more than the permissible limits...
Tourism Infrastructure

as defined by the Andhra Pradesh Pollution Control Board. (Baseerat, 2014)

**Buses**

Buses are the primary mode of public transport within the city. They run at a good frequency and have good connectivity to most, if not all, areas of the city. A number of private tour operators also run buses to and from popular destinations (e.g. Ramoji Film City) and inter-city buses ply between Hyderabad and other major cities. Given the difficulty of reserving a train ticket in India, these buses are increasingly gaining popularity. Despite the many positives, the mode is not without its share of problems, particularly in the context of visitors and tourists in the city.

- Bus routing is not intuitive, routes are designated by various number and letter combinations and there are no route maps or guidebooks that can help people get acquainted with the system. A lot of the signs at bus stands are in Telugu, the local language, which makes it difficult for people unfamiliar with the language.
- Several locations of the city which have become important bus hubs where multiple lines ply, serve as transfer stations such as Toli Chowki, S.R. Nagar but these stops don’t have dedicated transfer stations to handle the large volumes of bus traffic. A combination of factors like metro construction, road diversions and large

Figure 7: Route map of the Hyderabad Metro shows that it connects places of interest; Source: Hyderabad Metro Rail website (www.hmr.gov.in)
numbers of buses stopping, has resulted in traffic bottlenecks in these areas.

Auto-Rickshaws

As has been previously mentioned in the discussion on informal networks, auto-rickshaws are one of the more commonly used transport options in the city. Despite government regulations that enforce fare metering and fuel use for autos, auto-rickshaw drivers are generally a law unto themselves. Foreign tourists especially, who are unfamiliar with standard rates, very often get conned into paying much higher fares.

Other issues with road transport

An increase in population and automobile traffic has resulted in severe congestion in Hyderabad in the last few years. Heavy vehicle traffic is poorly regulated with buses and sometimes trucks plying within the city center and within a whiskers length of a number of monuments of historical significance. (Figure 8a) The impact this has is best demonstrated by the fact that a chunk of the Charminar fell off in 2001 which was attributed in a subsequent report to the stresses caused by heavy vehicular and people traffic within such close proximity of the monument. In response, there have been efforts to pedestrianize the area immediately adjacent to the Charminar and to reduce automobile traffic in areas close to historical structures. Inner and outer ring roads are under construction as a means to divert traffic, particularly heavy vehicles, around the city rather than through it.

Pedestrianization

In tandem with proposals to reduce inner-city traffic congestion are proposals to improve the city for pedestrian traffic and make it more suitable for human mobility. The old city in particular is densely built up with a number of small, old buildings and a few shanty towns. In the midst of this lie buildings and sites of historical significance which along with their surroundings are heading towards ruin.

Figure 8: (a) Road congestion in Hyderabad (b) Traffic and crowds around the Charminar support the need for pedestrianization projects

Source: Deccan Chronicle Archives; newswala.com
Pedestrianization projects seek to improve pedestrian connectivity to these sites. (Figure 8b) Among various schemes, the most important is the Charminar pedestrianization project which aims to convert the area immediately adjacent to the Charminar into a pedestrian only zone.

◆ **Approach to Tourist Sites**

High urban densities in Hyderabad have resulted in monuments and heritage sites being eclipsed by other constructions that have cropped up despite prohibiting regulations. To cite an example, as per regulations of ASI most activities are prohibited in areas that are within 100 meters of a protected monument, mining and construction are disallowed within a further radius of 200 meters. The regulations are seldom enforced. Encroachments are frequent, police ineffective and stakeholder groups too many to regulate such developments entirely. At the Golconda Fort which has the highest degree of protection by the Central Government, shops and housing can be seen in abundance less than 10 meters from the walls of the fort; similarly the entrance to the Chowmahalla Palace is through a small, unimpressive gate that is lost amidst the surrounding built area. As a result, a number of historical and heritage sites of varying degrees of importance are lost in this dense urban fabric, further detracting from their historical significance as well as the tourist experience.

◆ **Charminar Pedestrianization Project**

In response to the 2001 incident when a chunk of the Charminar fell off, the municipal authorities conducted a study which determined that the degeneration of the monument was a consequence of the immense stresses placed on it by human and vehicular traffic adjacent to the monument. Besides, the lack of proper zoning laws and development control has resulted in a mismanagement of the available space which deters people from accessing this area which has held cultural, religious and economic significance for several decades. The Charminar Pedestrianization Project hopes to achieve through pedestrianization, heritage perseverance and infrastructure development, a precinct that is “accessible, safe, secure and aesthetic”.

The project initially faced severe opposition from various stakeholder groups; shopkeepers and merchants working in the area believed that restricting automobile access would negatively impact their businesses and citizens while residents were concerned about the inconvenience that it would cause. In the interests of preserving the monument the municipal corporation has pushed ahead with it. Where earlier, stalls used to be set up on any available square inch of pavement, GHMC has now mandated that every vendor possess a government-issued vendor card and ply their trade only within restricted areas of the district. This measure is aimed at preventing encroachment of municipal and public land and promoting safe, economic zones. (Charminar Pedestrianisation Project, n.d.) Presently, the area immediately around the Charminar is closed off to buses and automobiles, although auto-rickshaws continue to run around the monument.

*Heritage Walks*
Heritage walks initiated and designed by Ms. Madhu Vottery and administered by AP Tourism, are initiatives that seek to promote the cultural heritage of the city. Visitors and tourists are guided around the history rich city center of Hyderabad for a meagre, easily affordable charge of Rs. 50 which includes entry fee to the monuments covered as well as breakfast. There are four different guided tours available, three of which begin at the Charminar and cover key historical and cultural sites in the old city during the course of one and a half hours. (APTDC, n.d.)

**Improvements and Recommendations**

From a tourist’s perspective connectivity can be improved by adopting several simple practices to encourage use of public transport and improve accessibility.

- **Encouraging multi-modal connectivity and efficiency**

Being a non-local, a tourist in particular is unlikely to have access to a personal vehicle and will be more heavily dependent on public transport. This can be addressed by enhancing the commuter experience by running regular trains with announcements and schedule information in multiple languages.

In order to make auto-rickshaw use more tourist friendly, it would help to enforce metering. The problem is however systemic and is likely to take a great deal of time to eradicate entirely. In the meanwhile, it would help to educate tourists about typical auto fares so that they learn to bargain effectively and not get swindled.

- **Additional pedestrianization projects**

They can be initiated in areas which experience high people traffic and large numbers of tourists, like the Golconda area and markets at Koti. These are areas which have a number of shop-lined narrow streets and gullies which are ideal for pedestrianization since they are densely packed and visually attractive; automobile traffic causes chaos and detracts from this experience.

- **Transportation information**

Transportation options that are available to tourists could be advertised in brochures, maps and guide books that can be made available at entry points like intercity railway stations, bus stands, airports; they can also be sold by various private operators. Further, steps could be taken to assess the benefits of distributing them for free or for a token amount. Encouraging private tour operators to advertise their services in such brochures helps offer more options to tourists apart from being an effective means to generate revenue.

As smart phones and mobile internet is becoming increasingly popular and affordable in India, smart phone apps are a highly effective and convenient means to deliver real-time information on travel options and conditions. When integrated with mapping services like Google, they become all the more useful for a tech-savvy traveler.
Infrastructure for Accommodation and Hospitality

The National Tourism Policy as well as the Andhra Pradesh State Department of Tourism identify the number of hotels and lodging services as one of the greatest strengths of the tourism industry in the state. (Department of Tourism, Ministry of Tourism and Culture, Government of India, 2002) (Appendix B) With the growth in tourism in the country, the hospitality industry has correspondingly grown to provide a variety of different services, be it accommodation or catering that caters to all groups of people, to the extent that there is now a surplus of hotels and lodging facilities available.

However, the tourist surveys identified a few gaps in the accommodation services that could be targeted as the sector develops further. One of the main drawbacks of the existing accommodation services is that while it has grown in quantity to correspond to the growth in the tourism sector, it has not grown in quality to the same extent.

- Among these are the mediocre sanitation and hygiene standards in many places, a criterion that takes precedence above all other factors including cost of the facility and location of the hotel.
- Further, tourists complained of a lack of suitable options available for the middle class; the prices at most facilities were either too steep or too low-priced where they were looking for slightly better accommodation. These two factors combined forced many tourists to look for better options that served their needs away from the city center and thereby away from places of tourist interest which in turn was inconvenient in terms of transport and communication.

Hyderabad has recently seen a growth in specialized tourism such as medical tourism and MICE (Meetings, Incentives, Conferences and Exhibitions) which requires specialized facilities that the hospitality sector does not entirely meet.

Improvements and Recommendations

- Rating Systems and quality assurance schemes should be developed and implemented to ensure that accommodation facilities meet minimum standards

Sanitation and hygiene is the main concern of tourists when selecting accommodation and lodging. Poor sanitation and health is also a concern for international tourists when traveling to India which suggests that poor hygiene has impacts beyond the local and beyond a simple choice of accommodation. Hygiene standards in accommodation facilities is thus an important consideration that influences the quality of tourism overall.

Hygiene standards in hotels can be maintained by establishing minimum hygiene standards that all hotels must follow which might include at a bare minimum clean water, functional restrooms or pest-free services. A rating system might also be established, similar to the hotel rating system, that classifies accommodation services according to the quality of hygiene and sanitation that they offer, a system which would need to be
ensured through regular quality assurance checks.

- **Development should be directed at meeting the needs of specialized tourism initiatives**

For instance, patients or people who are in any way incapacitated might need easy access to their hotel room, washrooms and services; rooms and facilities should be designed to adjust medical equipment and maybe house caregivers. Hyderabad has one of the largest, international convention centers in India and has seen steady growth in recent years of all kinds of national and international conferences – in recent years, an international doctors’ conference and a conference on biodiversity – which requires a different nature of hotel and hospitality services. These could include scheduled pickup from airports and train stations, luxury amenities scaled to serve larger groups, conference and meeting rooms on the hotel premises and so on.

This kind of synchronous growth would require greater cooperation and communication between the tourism and its associated hospitality industry. Tourism policy could provide more information with regards the course that the tourism sector is growing in and thereby provide better direction for future growth. Policy initiatives could also strategize and provide incentives for these associated industries for parallel growth of the hospitality industry.

**Quality of Tourist Sites: Congestion and Overcrowding**

Apart from the administrative and pricing challenges that have been previously discussed, tourist sites are distressed by poor sanitation and overcrowding. The latter in particular is a difficult problem since it brings into conflict several disparate issues: impact that overcrowding has on the monument structure; a judicious pricing system that is profitable for the industry; equity considerations, especially for locals; and the unavoidable high population numbers and density in Hyderabad. The overcrowding within tourist sites however needs to be addressed in a sensitive manner since it detracts from the tourist experience.

**Improvements and Recommendations**

- **Re-evaluating pricing**

As has been previously discussed, pricing schemes need to be re-evaluated frequently to ensure that the monument or tourist site invites only a practical number of people or crowds that do not exceed holding capacity. This needs to be balanced with equity considerations to ensure it is not unaffordable for those from lower income classes.

- **Restructuring layouts**

Tourist sites could be restructured to reduce bottlenecks at certain points and better disperse visitors around the premises. Good, clear approach roads will reduce traffic congestion around the
monument; multiple entrances to larger properties such as the Golconda Fort, Chowmahalla Palace or Shilparamam will help mitigate bottlenecks at the single entry point; multiple counters and lines for ticket booths and security screenings will reduce waiting times; attractions and services that are distributed around the site as opposed to localized at a certain area will further help disperse crowds and reduce a sense of overcrowding.

**Quality of Tourist Sites: Services and Amenities**

The tourist surveys gathered several useful suggestions to improve the quality of services and amenities offered on-site. Despite the fact that most tourists rated services moderately well, several expressed dissatisfaction with specific aspects that could be improved upon. These have been discussed below along with specific recommendations.

- Primary among the complaints was the poor quality of restrooms and drinking water facilities which would need to be addressed by administrators along with quality assurance for water quality and hygiene standards.

- Maps and guide services were found to be either absent or of a very poor quality. Maps and brochures were not available at most sites which, along with the lack of information boards, makes it virtually impossible for tourists to get any genuine information about the attraction, the history of the attraction or the services offered which in turn can make the visit almost aimless. Providing these boards, maps and guides at tourist sites will help increase the attractiveness of the site while also publicizing information on the site. These amenities offer several opportunities for involving the community: students and other members of the public can be asked to design these boards; community members can volunteer as tour guides which will increase promote pride in cultural heritage; funding for the boards can be derived from advertisements and sponsors.

- Other relevant suggestions include flexible tours which cater to all demographics, particularly the elderly and children. Attractions for each of these groups might be different. Children for instance, might be more interested in theme parks, attractions like Snow World or the Ramoji Film City while the elderly, based on interviewees’ observations, are more interested in heritage sites and places of historical significance. Moreover, these are groups which might have other requirements such as flexible timings, access to specialized facilities such as wheelchairs and so on which could be provided for by the tour operator.

- Further, a number of people expressed misgivings regarding security services with one expressing discomfort with the manner in which screening was conducted. The quality of security and maintenance services also reflects on the gap between training institutes and the tourism industry’s requirements. Apart from job skills, education and training institutes should also sensitize personnel to the issues concerning
privacy and courtesy which would go a long way in increasing the comfort level of tourists.

Advertising and Information Dissemination

Discussion and Recommendations

- Most of the people surveyed were reliant on the internet for getting information on the available attractions and tour services, but found that the information on the internet was inadequate or unreliable. Up to date information needs to be made available, possibly with linking to other relevant websites which provide more information or tour services for greater ease.

- There was a lack of brochures and other material at entry points like railway stations and airports with the allocated booths remaining closed more often than not as reported by several tourists. Brochures and other relevant information should be provided at these entry points for visitors who are new to the city. Paper material can also be distributed at places frequented by tourists such as hotels and popular tourist attractions. This would need better coordination between the advertising department of the tourism corporation, the hospitality industry and the administration at various sites.

- Advertising for the sector needs to keep pace with the growth in information technology. Mobile applications for real time updates and similar alternatives can be considered for more effective advertising. These technologies are however not available to everyone, particularly lower income groups and it therefore becomes important to consider the method by which quality information can be provided to these people. Involving people who participate in the informal tourism sector and who have an effective, established network for information dissemination might be a resource to consider when trying to improve advertising effectiveness.
Over the course of three weeks in Hyderabad, site visits were conducted for major tourist sites in the city and a description of these sites along with potential areas of improvement have been identified and described in this section.

**Shilparamam**

**Pros**
- The area is very clean and well maintained with manicured lawns, paved paths and landscaping.
- It carries a number of stalls with representation from every state of India, that sell a variety of items like clothes, handicrafts and other merchandise showcasing the distinctive artistic specialty of each region.

**Cons**
- Although brochures are available, these are not being offered to visitors on entry and are in fact supplied only when specifically asked for. The brochures are also not very informative and some basic details that are very relevant to the tourist, such as a map of the Shilparamam layout have not been incorporated.
- Signage apart from being aesthetically inconsonant with the surroundings is also conflicting and misleading in some instances. Some of the display boards and signs have misspelled words and poor grammar and thus give an appearance of being unprofessional.
- Some of the paths are unpaved and routes to the entrances are unnecessarily convoluted. The roundabout approach without accurate signage can deter people from visiting the exhibits e.g. model village.
- Among the series of stalls that are set up, a large number are empty. This detracts from the pedestrian experience and increases walking time. (Figure 9)
**Pros**

- Although there are no maps or brochures on offer, there is a large display board with a map of the complex drawn to scale. This serves as a useful navigational guide for visitors to chalk out their route around the large complex.

- Information boards located alongside the exhibits are informative, attractive and in good language.

- Clean, well-maintained toilets and drinking water facilities are present and conveniently located.

- The place has an on-site medical station and services for medical emergencies run by a partner NGO, the Anusttha Foundation.

- The security services in the area are good. They ensure that photography is restricted only to exhibits that are allowed to be photographed. However, screening measures are less stringent with regards to items that can be taken inside. For instance at the entry point where security screening is done, despite metal detectors constantly beeping people are allowed to enter without any kind of checking.

**Cons**

- Although there is a display map at one place, it is difficult to find your way around the large complex without a paper map or brochure for quick reference.

- There are no information boards in any language other than English. Typically information boards at tourist attractions in India come in three languages: English, Hindi and the local language.

- Although the place is very well-maintained, it seems overstuffed and inefficient. To quote an example one can see several women performing the task of sweeping a single, carpeted stairway with brooms when the same task can be executed much more efficiently with a vacuum cleaner. (Figure 10)
**Charminar**

**Pros**
- The pricing scheme is much like that at Golconda Fort which establishes consistency between the monuments managed by the ASI.
- It is reasonably well maintained and well-staffed.
- There are ramps for wheelchair access on the ground floor but not to the upper levels since doing so would involve making very significant changes to the structure of the monument.
- A police station is located right across the street so there is adequate security at all times.
- There are benches to sit on in the outside ring which while providing sitting areas for visitors, does not detract from the monument itself.
- The water in the inner tank is relatively clean and fresh.

**Cons**
- Despite the security there is a fair amount of vandalism, much of which has probably been there for a while.
- Heavy traffic is allowed right up to the monument which has, according to a past report, been responsible for the rapid deterioration of the monument’s structure e.g. in 2006, a chunk of the Charminar fell off onto the road. Despite recommendations that traffic to the monument be regulated, it has seen only poor implementation.
- Birds can be seen flying in and out of the open structure of the monument and bird droppings are present in a lot of places since cleaning is not done often enough.
- There are no tour guides present although the Heritage walks on the weekend begin at Charminar. The heritage walks have their own tour guides who are not very effective since their language and diction is difficult to understand. (Figure 11)

*Figure 11*

(a) View of the Charminar from a distance; (b) The Charminar has ramps for disability access; (c) Scribbling and vandalism of the monument; (d) View from the Charminar of congested streets
Golconda Fort

Pros

- They are particular about not allowing bags inside the fort area since people have in the past carried instruments and paints to deface and vandalize the walls.

- There are a lot of very knowledgeable tour guides who can be hired on the spot for different durations and various sized parties to give people a personal tour of the fort. There are brochures and maps available for a small fee (Rs 20-50) by private vendors within the grounds.

- There are provisions in most places for disability access with ramps being provided at strategic places without disturbing the aesthetics of the fort.

Cons

- The approach road to the fort is narrow and congested and not suitable for two-way traffic. Further, the immediate surroundings of the fort is cramped and packed with shops and people. Apart from violating the laws laid down in the Ancient Monuments and Archaeological Sites and Remains Act, this crowding is also bound to increase the stress on the monument.

- As is typical of most ASI run facilities, there is a steep price difference between the charges for foreigners, and Indian citizens with the former getting charged Rs.100 as compared to a mere Rs. 5 for locals. The price for the sound and light show is a further Rs. 250 for all people alike which is very high in comparison to the entrance fee of Rs. 5.

- The maps and brochures available from the private vendors are of poor quality and more than one person I interacted with, was unable to read the map to find his way around the site, which defeated the purpose of a map in the first place. The brochure, which is meant to assist a self-guided tour, is poorly made and lacks a lot of relevant information which could be of interest to the tourist. People are often unable to read and correlate the places marked on the map and brochure with actual places in the fort.
Site Visits

since there are no additional information boards either.

- Marking and signs for public restrooms and other facilities are not strategically placed; a number of visitors can be spotted going around in circles trying to locate these conveniences. During my visit some children were spotted outside the restrooms asking people for money to use the facility although these facilities are free of charge. When the authorities were asked about this, they expressed surprise and unawareness.
- Despite enforcing the no bags rule for the vast majority, they do have a provision for allowing bags inside if absolutely required. These cases are evaluated individually and subjectively and the bags are allowed inside if the guards are satisfied, for a measly fee of Rs. 5. During the visit, a bag with academic material was given a very cursory glance before allowing it through. (Figure 12)

**Qutb Shahi Tombs**

**Pros**
- Efforts are on to renovate the place with support from various bodies and private organizations like the Aga Khan Foundation. The office and museum on the grounds look new and well maintained.
- The Aga Khan Foundation representatives come across as well-informed about the problems that the site faces and clear about the steps they would need to take to remedy them. Unlike other initiatives, they have chosen to adopt traditional building practices for the renovation work as they are better suited to these historical structures and are long-lasting. At the time of the site visit, work was in progress on a couple of tombs and the differences between the renovated tombs and the others was clearly visible.
- With the help of the foundation, efforts are being made to involve the local community in maintenance and development activities by employing them on site. Simultaneously some of the revenue is being used to address social issues in the Golconda area where the tombs are located.
- Despite the fact that the entire grounds are overgrown, the abundant vegetation also provides a lot of shade and there is a sense of serenity about the place. The fact that it is not a very popular attraction is evident by the lack of crowds or visitors.

**Cons**
- The first impression one gets of the place is that of utter neglect: there are withered, overgrown lawns, some muddy areas, no paved paths, no signboards, etc.
- The entrance fee is again fairly random with Rs. 10 being charged for entry, Rs. 20 for a camera and Rs. 100 for a video camera.
Information boards are located in only one or two of the several tombs and are placed randomly i.e. they are not located at the entrances nor are they easily spotted.

There are absolutely no facilities available on the sprawling grounds be it restrooms, drinking water or refreshments. There is one, unappealing map located at the entrance that few are likely to remember or be able to follow.

The interiors of the tombs are very dark and dismal. The tombs themselves have no windows except for tiny openings that barely allow light through. Despite this, there is no provision for any interior lighting which makes it virtually impossible to observe the tombs indoors.

Walls are chipped and broken in many places and there are severe signs of neglect and poor maintenance. Scribbles and etchings are rampant on most walls of the tomb. The vandalism seems almost inevitable given that there are no maintenance staff or security guards in sight despite the fact that this site is considered important by the State Department of Archaeology.

Security on site is non-existent. People are allowed to carry inside bags with any articles and there is no checking. There are no guards even on site to prevent vandalism.

Surprisingly, there are no boards restricting photography inside the tombs. (Figure 13)

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**Figure 13**

*Partially restored tomb*

*Defacement of the walls*

*Broken benches and lack of vegetation on the grounds*

*Poor lighting inside the tombs reduces visibility*
Site Visits

Salarjung Museum

Pros

- The museum is very well maintained and one of the better examples of privately managed attractions in the city.
- Security services are very professional and thorough. They disallow large bags inside and check and charge for cameras and video cameras.
- Display boards with information in 3 languages English, Hindi and Telugu are present alongside each exhibit thereby catering to a large audience. Additionally, audio tours are available in English for a fee of Rs. 60.
- As a measure to protect the exhibits on display flash photography is not allowed. Neither is photography of other patrons of the museum authorized. The use of photographs in any publication without permission of the authorities is not allowed. These rules are strictly adhered to.
- A canteen and a museum shop for souvenirs are present, which indicate initial steps towards commercialization of the site.

Cons

- The pricing is different for locals and foreigners. The charge is Rs. 10 for locals, Rs. 150 for foreigners, Rs. 5 for children and Rs. 50 for a camera revealing a discriminatory policy.
- During the entire site visit of three hours, there were no foreign tourists visible which suggests that either the museum is not popular with foreign tourists or is not promoted properly.

Discussion, Improvements and Recommendations

Although the sites covered were only a few of the many attractions in the city, they were useful in providing a broad idea of the main problems that afflict these tourist spots and the initiatives that can resolve them. Improvements at these sites should focus on addressing deficiencies from the perspective of a tourist. Based on the results of the tourist surveys as well as observations recorded during the site visits, the main improvements and recommendations are:

Infrastructure and sanitation

A number of attractions suffer due to the approach roads being congested and surrounding areas being filthy and inhospitable, which deters people from visiting them. Common problems with surrounding areas include undisposed garbage heaps, open sewers and drains and inadequate parking.

- Encouraging private ownership and maintenance of the surrounding area

Partnering with the owners of heritage sites and other attractions to maintain hygienic and welcoming surroundings could take the onus off the municipal corporation while also helping improve sanitation near these sites. Most sites employ maintenance staff to manage the interiors; some as in the case of Chowmahalla Palace appear overstaffed. The municipal corporation on the other hand is probably understaffed for city maintenance services. Tax incentives could be provided to site administrations for maintaining clean surroundings; the move would be mutually beneficial to both the...
municipal corporation as well as the tourist sites.

- **Partnering with students and social service schemes for sanitation and public participation**

Most schools and institutions in India run mandatory schemes for student social service such as the nationally recognized National Service Scheme (NSS); the municipal corporation could partner with academic institutions and encourage students to organize and participate in clean-up drives and sanitation campaigns. This would serve to encourage civic sense as well as a sense of ownership among citizens.

**Provision of facilities and services**

One of the most apparent problems with sites which needs to be addressed is the inadequacy of facilities such as drinking water, restrooms, security and medical care.

- **Partnering with NGOs**

Encourage NGOs to partner with these private entities to provide amenities and services at these various sites. For example, the Anustha Foundation which runs a clinic at Chowmahalla Palace is looking at expanding its services to the Salarjung Museum. Incentives such as tax rebates could be provided to other NGOs working in the sphere of infrastructure development at tourist sites.

- **Pay-and-use**

Public facilities in India are often severely misused due to the large demands placed on them by poor and homeless populations. For example, public restrooms may be used by people to bathe and wash clothes which, in addition to defeating the intended purpose, causes a whole host of other problems ranging from water shortages to hygiene and cleanliness issues. Pay-and-use facilities have thus been adopted at various public places such as railway stations or temples. Similar facilities such as pay-and-use restrooms, storage areas for baggage, drinking water etc. can be provided for a small fee at various tourist spots. Apart from reducing the chances of misuse, the revenue generated from such facilities can be used to pay for the capital costs and maintenance of the service.

**Information Services**

Another issue identified with most public sites is the lack of suitable information services be it in the form of brochures and notice boards or adequate online information. Tourism authorities need to devise methods to provide authentic and updated information to the public, and this information should be made easily accessible.

**Entry fees**

Another common concern at most tourist attractions is the difference in entry fees for local and foreign tourists which comes across as discriminatory and is not appreciated by foreigners. Based on the survey responses, locals also feel that the much higher charges imposed on foreign visitors is unwelcoming and should be discontinued. Private authorities which use this differential pricing scheme could be encouraged to use more standard rates for all visitors, locals and foreigners alike.
The tourism industry is vital to the Indian economy from a variety of perspectives. Economically speaking, it is one of the primary sources of foreign exchange, it generates both direct and indirect employment, contributes to exports, and induces large growth in other sectors due to multiplier effects. Socially, it promotes pride in cultural heritage and encourages cultural and global understanding, while environmentally, it has fewer impacts as compared to other manufacturing or industrial sectors. Hyderabad in particular has a lot to offer via way of attractions that emphasize cultural and historical heritage.

A discussion of the key takeaways from this study and corresponding recommendations have been given below.

- **Tourism development needs to be approached in a holistic manner keeping in mind the direction in which the sector is developing**

Tourism in Hyderabad consists of a number of interconnected and interdependent processes or subdivisions working in tandem with each other. Improving any one of these aspects requires a thorough understanding and analysis of the impacts that it might have on other related processes. For instance, demarcation of administrative responsibilities might determine the effectiveness of tourism management; funds for management are determined by revenue generated which in turn depends on the pricing; this in turn impacts quality of infrastructure and the manner in which people participate with their cultural heritage. Regulation of any of these aspects is likely to have an impact on other related processes. Tourism management thus needs to be approached in a holistic manner with improvement of all these processes synchronously.

The direction in which the tourism industry seeks to develop should also be taken into consideration when making administrative decisions and every process should be geared towards that common goal. Apart from traditional heritage and cultural tourism, tourism in Hyderabad is diversifying into other specializations such as medical tourism and the MICE concept of Meetings, Incentives, Conventions and Exhibitions. Growth along these directions needs to be supported by growth of associated infrastructure such as suitable accommodation, travel services, and other facilities which again depends on tourism management occurring in a holistic manner.

- **Holistic tourism growth depends on sound and well-structured administrative framework with clearly delineated responsibilities and participation from support sectors**

Tourism administration in Hyderabad is a divided responsibility among a number of different bodies functioning at the central, state, municipal and district levels but with little demarcation of responsibility or a defined hierarchy. This serves to complicate the administrative process unnecessarily and leads to inefficiency and neglect of certain essential components of the tourism framework. It also hinders maintenance of sites when this responsibility is divided among so many different bodies. This could be addressed by considering a more streamlined flow of
administration with a more structured distribution of work and responsibilities along a hierarchical system to ensure accountability from lower to higher bodies and vice-versa.

Further, tourism management decisions could invite greater participation and input from various support sectors: transportation services for tourism would require a collaborative effort between the tourism departments, the municipal government and the road and rail transportation divisions; resolving maintenance issues would require the participation from private owners and municipal services; improved hospitality services would require the involvement of hotels, catering services and training institutes and so on.

Participation should also be secured from other participants including non-profits and non-governmental organizations working in the sector, the informal network of hotel owners, auto drivers and various other people who contribute to the efficient functioning of tourism in the city and the citizens of Hyderabad who hold a stake in the cultural heritage of their city.

- **Successful tourism is reliant on a foundation of purposeful infrastructure and amenities**

Ultimately, the tourist experiences the front-end of the functioning of the tourism industry. Therefore, tourism growth needs to be supported by sound infrastructure and services that serve to make more efficient the various different sites, attractions and amenities offered. This could include affordable and well-connected transportation, accommodation that caters to all income classes, facilities at tourist sites like restrooms and drinking water and commercial ventures like guide services, souvenirs and other attractions. Such infrastructural development should be carefully planned to highlight the best of Hyderabad’s attractions and improve the tourist experience.

- **Public participation and equity considerations are essential components of effective tourism**

The public is an essential component for the effective functioning of any sector and tourism is no exception. Tourism is essentially a sharing of the cultural resource of a city with visitors and can contribute to a drain on important infrastructural supplies of the city such as water and electricity utilities. Equity for citizens and sustainable growth that keeps pace with advancement in other sectors should thus be kept in mind before developing tourism; this brings one back to the concept of sustainable and holistic growth of the tourism sector.

Further public participation helps secure pride in the cultural heritage of the city, which in turn manifests in the form of better maintenance and treatment of heritage sites (for example, less vandalism), more public participation in policy and administration which guarantees accountability of administrative bodies and a more welcoming atmosphere for visitors.

- **Involvement of various actors should be ensured with stringent, focused policy measures and quality assurance checks that are reviewed on a continuous basis**
Current policy directives are very broad and do not provide adequate direction for various parties. Future policies and municipal ordinances should take into consideration the role played by these different actors and account for them in various policy directives. For more effective policy, the requirements of each of these players should be given consideration through a continuous dialogue between them and the policy makers. Among the most sensitive actors are those in the informal sector who participate on the fringes of the tourism industry and yet contribute significantly to the functioning of the tourism in Hyderabad.

Ensuring that the actors are suitably responsive to the policy measures would involve frequent quality assurance checks, particularly for issues like hygiene and sanitation, law and order and so on.

Presently, policy is reevaluated once in several years, sometimes decades, which makes it outdated and inefficient. These policies and quality standards would need to be reevaluated frequently to respond to the rapidly changing demands of the industry and the new challenges that it poses.

In summary, this study has approached tourism in the city of Hyderabad from an administrative and infrastructural standpoint.

It recognizes limitations such as the political and infrastructural climate of Hyderabad which is changing very rapidly: the division of the state of Andhra Pradesh into Andhra Pradesh and Telangana for one is likely to cause a revision of state policies, including those for tourism; similarly although the metro rail construction is causing a disturbance in the city temporarily, the positive effects are likely to affect tourism in upcoming months and years. Mutability of urban environments is however the very essence of city planning and this study has chosen to focus on the more stable aspects of the city.

The improvements and recommendations described in the document, if implemented, are likely to go a long way in streamlining administration, heritage maintenance, and infrastructure and as a consequence easing and improving tourism in Hyderabad.


tourism-sector.pdf

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Appendix A: Surveys

Background and Purpose

A survey was conducted of tourists visiting various tourist destinations in Hyderabad with the purpose of gaining their views on the adequacy and quality of tourism infrastructure in the city; an effort that could help assess the strengths and weaknesses of the existing system.

Few studies have been conducted previously which aimed to garner opinion on the tourist experience and response to the services offered. A study by Madhavan and Rastogi attempted to evaluate social and psychological factors that impacted destination choice of domestic tourists in India by conducting surveys in two cities: Hyderabad and Tirupati. They found that factors that contributed to a favorable tourist experience were largely dependent on the type of site and primary purpose of visit. Tirupati being primarily a religious and pilgrimage center, people attributed less importance to factors such as travel convenience as compared to Hyderabad which has greater historical and cultural significance. For Hyderabad, people placed affordability and comfort in terms of travel and accommodation higher on their list of priorities and gave importance to other factors like availability of time, direct connectivity to the destination and prevalence of entertainment areas. (Madhavan & Rastogi, 2013) No other relevant study was found aside from this.

Unlike the aforementioned study which studied destination choice, this survey attempts to evaluate the tourist experience to identify deficiencies in the system which in turn can pinpoint target areas for improvement and help shape future tourism and heritage policies.

Survey Instrument

The survey instrument consisted of a questionnaire that was divided into seven broad sections: Travel and Transportation, Accommodation, Tourist Attractions, Services, Overall Experience, Advertisement and Demographic Questions. The purpose of the questions on transportation were to gather opinion on travel to and within the city as well as seek suggestions on how the system might be improved. The section on accommodation similarly aimed to evaluate the factors which affect choice of accommodation and how the services of hotels and other accommodations might be better modified
to suit tourist needs. ‘Services’ aimed to evaluate the effectiveness of currently provided amenities and services (by asking tourists to rate quality) while the sections on tourists attractions and overall experience posed questions on other aspects of their experience not covered in the other three sections. The section on advertisement was aimed at evaluating the availability and effectiveness of information provided; the final section on demographics asked broad questions on age, income and whether they were domestic or foreign tourists.

The survey consisted of a mix of questions: those with multiple choices as well as open-ended questions seeking subjective opinions. The former consisted of questions asking people to rank their preferences or rate various services on a scale of 1 to 5 ranging from 1 being very poor to 5 being very good. Open-ended questions were aimed at gathering opinion on the inadequacies in the system that they have identified without influence from the choices provided.

Survey Methodology

Surveys were conducted on-the-spot at the following popular spots around the city: Charminar, Golconda Fort, Chowmahalla Palace, Qutb Shahi Tombs, City Center Mall, Hi-Tech City, Shilparamam, Hussain Sagar Lake, Eat Street, GVK1 mall.

A total of 65 surveys were conducted by approaching people randomly and requesting them to fill the surveys. No compensation or incentive was provided for participation and their involvement in the study was without any obligation. All questions were entirely voluntary; being a reasonably long survey, people chose to skip several questions which led to differing sample sizes for different questions. A qualitative analysis of the survey responses showed that a greater number of people responded to objective questions as compared to the open-ended questions. Despite the smaller number of responses to these questions, people’s responses provided a great deal of insight into the problems with the services and infrastructure and have been discussed in further detail below.

Survey Results

Travel and Transportation

To reiterate, this section endeavored to gather opinions on travel efficiency within the city for the specific purposes of tourism. When tourists were asked to rate efficiency on the basis of 2 major parameters- commute time and comfort of travel, most people reported a reasonable level of satisfaction with mean values of 3.03 and 3.16 respectively on a scale of 1 to 5.

A distribution by mode for respondents traveling from outside the city indicated that the two most common modes of entry to Hyderabad were inter-city trains and flights (37 percent and 29 percent), the latter mainly by foreign tourists (Non-Resident Indians or NRIs are included as foreign tourists according to the Ministry of Tourism). (Figure 1)

For commute within the city, a majority preferred to use either personal vehicles or autorickshaws, while few expressed preference for public transit options like...
In fact, in the laundry list of problems that people associated with the transportation network, the most voiced complaint was about the severely deficient public transit infrastructure. There were criticisms galore about the poor connectivity and sporadic bus services in the city. Additionally scarcity or non-existence of direct buses to places of interest; frequent bus transfers, lacunae in information services, lack of appropriate signage on bus stops, and an overall uncomfortable travel experience were other common woes that led tourists to opt for other modes of transportation. Respondents who were aware of the MMTS suburban rail service dismissed it as being an unviable alternative given the lack of reliability in train operations, frequent cancellations and a lack of information on train timings.

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**Figure A.1: Modes of Transportation to Arrive in Hyderabad**

**Figure A.2: Mode of Commute within the city**
Since this data included local residents, there were a considerable number who had a personal vehicle at their disposal and thus preferred to use those instead of relying on an undependable and erratic public transit system. Others however were forced to use autos and taxis which are more expensive options for the average wallet. Another common complaint was that of being exploited by auto drivers who refused to operate the meter and charged exorbitant prices on a whim (the traffic police wouldn’t enforce the meter either). The dearth of better alternatives meant that people were forced to pay the price even though they could ill afford it.

Among the other complaints were the poor traffic control, lack of lane control, and non-enforcement of traffic rules and regulations. A few reported bad experiences with unnecessarily rude and harsh traffic policemen; however based on personal observation and experience, I found the traffic police in Hyderabad to be much more efficient and conscientious than those in other Indian cities.

The above responses suggest a few policy targets for transportation:

- Developing public transit infrastructure – buses, MMTS trains, Metro rail - in terms of enhancing frequency and connectivity to popular tourist destinations.
- Improving implementation of the existing network so as to mitigate congestion and improve performance.
- Increase affordability of traveling.
**Accommodation**

Questions regarding accommodation were intended at understanding what a tourist looks for when selecting accommodation within the city. Many tourists skipped the questions posed, but among those who did answer, the majority chose hotels as their choice of accommodation as compared to other options like guest houses or living with friends/relatives. (Figure 4) More interesting was the fact that all those who favored living in hotels had selected privately managed hotels only, with none choosing government run facilities despite their being typically more affordable.

In evaluating factors that influenced their choice of accommodation, tourists were asked to prioritize the following assigning ranks from 1 (most important) to 5 (least important): Affordability, Hotel Rating, Hygiene and Cleanliness, Facilities, Location and proximity to services. They were also given the option of listing and describing other factors that influence their choice. With a mean of 1.52 priority for hygiene and cleanliness surpassed all other factors. The next aspect that seemed to have substantial importance was affordability with a mean of 2.66 while hotel rating was given the least importance at 3.95. (Table 1)

When asked to identify problems with the existing system of accommodation, the most significant complaints that tourists had have been listed below:

- The foremost grievance expressed was about the dismal state of sanitation in the existing hotels and the need for better washrooms was stressed.
- Lack of appropriate accommodation to suit middle class needs, was another issue raised. They pointed out the extremes in the standards of hotels – hotels were either extremely expensive or very cheap, bordering on being seedy. As a consequence some tourists were forced to choose more affordable hotels in the outskirts of the city thus taking them away from the vicinity of tourist centers. This gap between requirement and availability needs to be addressed while formulating future development plans.
- Another relevant suggestion by a tourist and doctor was that despite the rise in medical tourism in the country and particularly Hyderabad, the hotel sector hadn’t responded with accommodation suited to the needs of patients or those with specific medical requirements.

<table>
<thead>
<tr>
<th>Factor</th>
<th>Mean</th>
<th>Std Dev</th>
</tr>
</thead>
<tbody>
<tr>
<td>Affordability</td>
<td>2.66</td>
<td>1.33</td>
</tr>
<tr>
<td>Hotel Rating</td>
<td>3.95</td>
<td>1.14</td>
</tr>
<tr>
<td>Hygiene</td>
<td>1.52</td>
<td>0.95</td>
</tr>
<tr>
<td>Availability of facilities</td>
<td>3.32</td>
<td>1.41</td>
</tr>
<tr>
<td>Location and proximity</td>
<td>3.11</td>
<td>1.26</td>
</tr>
</tbody>
</table>

Table A.1: Rating of the different factors that affect choice of accommodation
**Tourist Sites**

The most popular sites that tourists visited and locals frequented appeared to be the Charminar, Golconda Fort and Hussain Sagar. While Hussain Sagar is an ideal retreat for families complete with eateries and considerable about of entertainment, Charminar and Golconda Fort have greater appeal as cultural and heritage sites.

An appreciation of culture and heritage or the historical charm of a monument was what attracted most people to visit these sites. Affordability in terms of low entry charges at the sites was a major factor that allowed many people to visit these places repeatedly.

A number of negatives were also identified with each of these:

- Poor maintenance of the monuments which detracted from the beauty of the place, vandalism of the monuments like graffiti and spitting of betel were specific noteworthy points raised, apart from criticisms about general lack of hygiene and sanitation.
- The sites were often overcrowded making the visit unenjoyable for genuinely interested patrons. Enclosed spaces like the stairway in Charminar to quote an example tended to become oppressive and stifling when frequented by large crowds.

**Services and Amenities**

Questions were also posed to tourists to ask them about the quality of services. Most people rated services between 2 and 4 on a scale of 5 and expressed general dissatisfaction with some of the services, particularly the lack of public restrooms and drinking water facilities. In terms of services they wanted, the most relevant suggestions were:

- Several mentioned that restrooms were poorly maintained and that drinking water was of poor quality. One tourist claimed that publicly available drinking water was heavily chlorinated, forcing him to buy bottled water due to health concerns.
- Better quality information boards and signboard: Families in particular would have appreciated some that looked at drawing children to the sites and were placed at a height suitable for children. Most boards were too wordy and lacked visual appeal which meant that people were not motivated enough to read them. One tourist pointed out that save for a few places, spellings and grammar on the boards in English were atrocious and in his opinion, shed poor light on India and the tourism industry.
- Self-explanatory maps: although few tourists seemed concerned with maps, a couple of them pointed out that there were no free maps provided and even those available for purchase were not very easily readable. With tour guides and private tours being too expensive for a fair number, it became all the more imperative that they be able to find their own way with the maps but they were not very easy to understand.
- Security services: while many expressed a general mistrust of security, one visitor revealed discomfort with the manner in which the checking was carried out, claiming...
that the security personnel needed better training and greater professionalism.

**Advertisement**

The questions posed tried to examine the extent, access and credibility of information available to tourists. When rating the quality of tourism oriented advertising in Hyderabad, the mean response was 2.75 and mode 2 on a scale of 1 to 5 where 1 was very poor and 5, very good. This suggests a mediocrity that people are dissatisfied with; on a positive note this also indicates the existence of a great deal of potential for improvement. Over two-thirds of the people surveyed were dependent on the internet for information on tourist options with others finding their way around by making enquiries from locals and friends. (Figure 4)

Specific issues raised and suggestions proposed with regard to advertising materials by tourists were:

- Few, if any were aware of the presence of brochures or other advertising material released by the tourism bodies.

While several tourists complained of the lack of information available at points of entry to Hyderabad like airports and train stations one visitor even went on to observe that the designated stall of AP Tourism at the train station was permanently closed. This points to incompetency of the advertising department and the bodies responsible for implementation.

Online information was often outdated and misleading. For instance, the online website states that the Shilparamam cultural exhibition is open 24 hours a day (confirmed by visiting the website) but on an actual visit a tourist found that the site closed at 9 pm. Further, despite it being an annual nation-wide exhibition, the exposure it received by way of advertisement was dismal; tourists remained uninformed till they actually visited Shilparamam itself. The lack of up-to-date information on websites is a particularly relevant shortcoming given that so many people are reliant on the internet for information. Another instance was of misleading information being provided:

![Figure A.4: Learning about tourism options](image-url)
tourists who visited the Sudhakar car museum expecting to see life-size models of cars were left disappointed when the models were toys instead.

A pertinent suggestion made by a tourist, that can be explored was that the advanced internet technologies on mobile phones could be taken advantage of and convenient mobile applications could be developed to provide real-time relevant information on travel and tours.

**Limitations of the survey**

Firstly, given the vast crowds in an Indian metropolis, it was challenging to identify tourists among the throngs of local people. In order to get representation and opinions from all strata of people, tourists from other parts of India and international tourists were identified based on the language they spoke or other defining characteristics. This in effect means that the sampling for the survey was not truly random and there was essentially a selection bias, although not one that should affect the outcomes of the survey significantly. Among the people surveyed, there were a fair number of local people, those who lived or worked in Hyderabad. Although not strictly tourists, these people had interesting perspectives on infrastructure for tourists in Hyderabad and so their responses were included in the final summary.

Secondly, although attempts were made to balance the nature of places at which the surveys were collected, be it heritage sites, entertainment zones or other places of tourist interest, a larger number of these were conducted at cultural and heritage sites. This might have resulted in the inclusion of a disproportionate number who professed an interest in history and heritage and therefore the sample might not be representative of the average tourist. However, since the greater part of this study focuses on heritage sites, the information is relevant for the purposes of this study.
Mr. Srinivas Rao

Role and designation

Mr. Srinivas Rao is an architect and Urban Planner with the Greater Hyderabad Municipal Corporation (GHMC) and also serves as the Additional Chief City Planner.

Responsibilities

With regards to tourism and heritage, the role of the GHMC is to improve the areas surrounding the tourist sites, mainly using funds from JNNURM (Jawaharlal Nehru National Urban Renewal Mission). The kind of improvement works mainly involves electrification, ducting, provision of pavements and signboards, laying and winding of roads. They also share some responsibility with the Heritage Conservation Committee of the HMDA (Hyderabad Metropolitan Development authority)

Types of Heritage sites

There are two types: Heritage Buildings and Heritage Precincts

Based on control and administration:

- Archaeological Survey of India – central government organization that recognizes only the Charminar and Golconda Fort.
- State Archeological Department – identifies a list of 37 buildings.
- Local level – 167 buildings listed by the government which are of historical importance. This only serves as a listing and is not actually conserved or protected.

Based on the permitted changes

- Grade I – No changes allowed, not even minor
- Grade II – Repairs and minor changes that are in harmony with the existing site
- Grade III – More major changes allowed including construction of new blocks etc.

Apart from these heritage sites, there are also heritage precincts and precinct boundaries define the scope of redevelopment activities that are undertaken as part of heritage conservation.

Some GHMC Policies

- Waive up to 75% of the property tax for private owners so that they are able to afford and maintain the site
- For those owners who wish to take up renovations, the government funds up to 20% of the estimated costs of 25 lakhs, whichever is lower. This is in the form of reimbursements so they need to submit relevant bills later.
- For those sites with a low Floor-Area-Ratio where property owners believe they will face losses, the GHMC awards Transfers of Development Rights to property owners.
- The Jawaharlal Nehru Technological University is the authority that evaluates proposals for construction or demolition of sites and gives sanction. Only in the event of a site being impossible to restore and a safety hazard will demolition be sanctioned.
- Looking to encourage Public Private Partnerships for restoration of sites e.g. the Aga Khan Foundation.
Advantages of Hyderabad

UNESCO visited sites a few days back – Golconda Fort, Charminar and the Qutub Shahi Tombs so Hyderabad sites are known world over.

Disadvantages or challenges

- Administrative challenges include lack of coordination between departments, frequent transfers of officers and overburdened staff
- Very poor civic sense and no public participation in maintaining the city; lack of public awareness
- Too many stakeholders to hamper the process: for instance a Charminar pedestrianization project with the establishment of inner and outer ring roads which was initiated in 1993 has still not been realized. The proposal faced stiff opposition from various stakeholders including the numerous shopkeepers who believed banning motor traffic would negatively impact their businesses, people who wanted to move through the area, religious groups who wanted to hold processions through the area, etc. which made implementing any change difficult.

Nature of administrative responsibility

The GHMC’s jurisdiction ends at the walls of the site and they are not responsible for any of the activities or maintenance of the actual site itself in any way, only for the areas around the sites. HMDA is responsible for parks and recreational spaces in the city.

Fixing entrance fees or employing people is not the responsibility of the GHMC. Normally the ASI in the case of Golconda Fort and Charminar or the other competent authority is responsible for fixing such rates.

Transportation within the city is managed by APSRTC or MMTS and the GHMC plays no role.

Funding available

Varies from year to year depending on the budget provided but JNNURM provided 35 crores somewhere in the 90s. They periodically release funds, normally in instalments of between 50-60% of the amount requested.

Ms. Madhu Vottery

Can you tell me a little about yourself?

Madhu Vottery, a conservation architect and author. I have designed Heritage walks for AP Tourism in 2009-11. There are four routes for which the research material was prepared and the guides were trained for the same by me.

How did you enter the industry and what motivated you to start working in the tourism sector?

As I was finishing my book, A GUIDE TO THE HERITAGE OF HYDERABAD: THE NATURAL AND THE BUILT, I was called to present my proposal for Heritage Walks. I liked the idea of applying my learnings from my Post Graduation into practice.

What do you see as the major advantages of Hyderabad as a tourism location?

To me tourism in Hyderabad is a lot about the Heritage Tourism. I expect that a lot of monuments can be saved by giving a new
use after restoration. Tourism can create a need for reuse. Heritage does not only mean buildings, it is also about saving our living heritage and natural heritage too.

What do you see as the major disadvantage of Hyderabad as a tourism location?

If the projects are not planned properly it can harm the city fabric and also result into a loss of living heritage and natural heritage.

In terms of heritage preservation, how well do you think Hyderabad is maintained?

We must appreciate whatever has been done in the field of Heritage Conservation. Good examples are, Chowmahalla Palace (awarded by UNESCO), Falaknuma Palace, HEH The Purani Haveli Museum. We have a long way to go, a lot many heritage components to be saved.

In terms of heritage promotion, how well do you think Hyderabad is advertised? (At the city, country and international level)

Not very well, we need to do more work in this field. We must appreciate that we have a well-designed APTDC website. The website of State Archaeology needs improvement, where we discuss the very rich heritage of Hyderabad in detail.

If there are any deficiencies with the above two, why do you think it exists?

Awareness amongst people.

What can be done, in your opinion, to improve it?

Start Heritage Education in the schools, where the students can learn more about their regional heritage. It should also be a part of the training of higher education for the students of tourism, and history. The Heritage Walks of Hyderabad should be made compulsory with all the schools and training institutes from Grade 2 onwards. At least one Heritage Walk in one academic year.

Which are the authorities concerned with the preservation and promotion of cultural heritage currently and how are responsibilities divided among them?

Please check the book.

Are there any problems with this division of power?

Please check the book.

What kind of support and funding is provided by these authorities to various parties concerned with tourism and heritage? For e.g. tour operators like the heritage walk, merchants from other parts of the country such as at Shilparamam.

Heritage Walks was funded by AP Tourism and guides were trained for it.

As a person concerned with organizing heritage tours, is there any other kind of support that you would like from the government/municipal corporation/ Ministry of Tourism etc.?

I am thankful to the Government to have given the support till date. I expect all the organization to work together to make it a better city.
Can you tell me a little about yourself and the role of the Aga Khan Trust for Culture?

I am primarily an archeologist and conservationist. I retired as a regional director of the Archeological Survey of India for Northern India and since then have joined the Aga Khan Foundation. I have worked in various states like Goa, Bihar, Uttar Pradesh, Madhya Pradesh, and Delhi at various sites of Hindu, Buddhist, and Islamic Architecture.

(One work includes a movie made called Rebirth of a Forgotten Temple Complex, Bateshwar, Chambal Valley where he worked with dacoits to restore a temple. It is available on Youtube.)

The Aga Khan Trust for Culture is an initiative by the Aga Khan Foundation and has been responsible for conserving around 30 monuments of Islamic architecture worldwide of which two are in India – the Humayun’s tomb in Delhi and more recently the Qutub Shahi tombs in Hyderabad.

What kind of work will be done at the Qutub Shahi tombs?

We will be working on conservation and landscaping work only using our funds entirely. We plan to restore the monuments using an ancient technology that was used originally while building these tombs. The mixture consists of a mixture of lime, urad dal (Indian name of a type of pulse), jaggery, egg white, gallnut etc. This has good adhesive power and much longer durability as compared to cement restorations that don’t last more than 70-75 years.

How much would restoration cost?

We estimate it to be about Rs. 100 crores ($16 million) but we will be using our funds entirely and not taking any from the government.

How much control does the government retain over the kind of work you do?

We sign an MOU with the concerned authority – if in the case of a national monument protected by ASI, we sign an agreement with them else an MOU with the concerned State Department of Archaeology, as in this case.

What are the challenges you face with such work?

There is no proper documentation of the architecture – for e.g. there was no documentation of the structure. There were no records of say section elevations, plinth etc. That alone took 1 year to create.

There are then legal angles. There are always complications with such initiatives. When we entered the picture, there were some fights going on with people who were against the State Department of Archaeology. We entered this without knowing fully what the issue was but unwittingly became a party to it.

Thirdly we had challenges with the technology itself. In ancient times, nothing was mechanized and since then the technology is not in use. It olden times...
there were bulls who used to drive the mixture in the *chakki* (mortar) but we now had to motorize the process.

*When people are chosen to work here, how are they selected?*

We have a mixed approach to selecting people. We have a number of local people but where special skills are needed, we bring in people from outside. Despite there being a large construction industry, we have very specific requirements.

These people are employed on a temporary basis because we can’t depend much on them so if we guarantee them employment, there is a drop in quality. For example, in lime slaking it is supposed to be submerged under water for 21 days but in our experience contractors will do it only for 3-4 days which compromises the strength of the structure.

Our overall aim is to revive livelihoods and ancient technologies.

*What are the criteria for the selection of sites by Aga Khan Trust for Culture?*

The Foundation has a different aim. As a regional director of ASI for Northern India, the ASI focuses exclusively on improving the monument with little consideration to the surrounding communities. The Aga Khan Foundation however is different: it focuses on firstly the monument and also important are the people around the monuments.

Mostly, whenever you go to a monument site there are poor people and backward communities around the site without the means to live so we try and combine urban renewal in our mission. A lot of these people have very conservative attitudes: for e.g. in Hyderabad it is almost completely a burqa system. Women barely come out and they barely communicate and as a consequence it is a backward community area and this is why we need to incorporate urban renewal also into our plans.

In my capacity as regional director of ASI, I tried to include initiatives to help the surrounding communities also. E.g. I was in charge of Delhi monuments which was both a great task and a great responsibility. I had to bring in laborers from Rajasthan, Madhya Pradesh, Bihar and other parts. The main problem was that after these people worked during the day, they would go to adjacent roads and beg for alms. They were not given the opportunity to study.

What I did was establish some small slum schools for e.g at Red Fort, Qutb Minar, Tughlaqabad Fort and so on. Many people objected to this but I continued because I was anyway not earning anything from it. I also started distributing blankets to the people there, a large fraction of which was from my own pocket. I sold blankets for 100 rupees after buying them in the market for 200 rupees. So this is a kind of urban renewal project also to revive these local people and communities.

The American Embassy saw it and appreciated it. When Mr. and Mrs. Obama were visiting India, they wanted to meet these children and I was assigned to take them around the schools. Naturally, some people in the government did not like it because it shows India in a poor light as not doing enough for the poor. When it finally came to the children, Mr. and Mrs.
Obama were completely at ease; they were sitting on the floor and talking to them like normal people. It had me thinking that had it been in India, the president and vice president would never have done that, except Mr. Abdul Kalam.

Are there any similar initiatives that are to be taken up near the Qutub Shahi tombs?

We have come here relatively recently. If you looks around you, you will notice that people here are mostly poor. Not the place there (to the west) but the Golconda area is mostly slums. People here are very poor, live in slums, have no access to education and opportunities. I feel that the so called Islamic terrorism is a product of such living conditions.

We visited the Area hospital there (in the Golconda area). The doctors there were very good. We had a long discussion with him and he said that there were many small things that could be done to improve the conditions without necessarily spending a lot of money. He asked for one or two people from your side. He said that one person can be used to guide patients and tell them where to go and come in the hospital. Aside from that. He also asked for funds for installing a generator in the operation theatre. He said that there is one but that is for the entire hospital and that cannot be run frequently because it requires too much diesel but a smaller one for just the operation theatre is required.

Has the foundation narrowed down on anything?

Not as yet. We are still considering our options but we feel we can make small contributions even in the absence of infrastructure. A small stitch here and a small stitch there can go a long way in improving society.

Switching tacks, are there any plans to commercialize the site itself? Like introduce attractions and other things?

The Aga Khan Foundation is not responsible for any commercialization and similar ventures but if you ask me as an individual I am very vocal about these issues. When in my role as an ex-government employee, I was very vocal about marketing these sites properly.

If you look at most of these sites, they are charged only 5 rupees or so (less than 10 cents) and with that kind of income there is no way we can generate enough to even run and upkeep the site. I had submitted a proposal earlier to the government and it is my personal opinion that we should charge at least Rs. 50 for a World heritage site and this is a minimum and Rs. 25 for non-World Heritage sites. Aside from this, there are a lot of films that are shot at these sites but they are charged only Rs. 5000 because the government feels that the films itself promote the cultural heritage and increase popularity. But I feel they should be charged Rs. 1 lakh (1,00,000) for an hour which is easily affordable by filmmakers who mint money.

Apart from this the Archaeological Survey of India also issues non-antiquity certificates for export of art work, antiques and various other items on which these people earn crores of rupees from abroad. To do this, the government has to conduct checks calling in two or three experts as well as other administrative work which requires governmental input but at the end...
they issue the certificate for free. They should be able to earn at least Rs. 250 for the issuance of a certificate which if they want they can charge from their customers.

Why are the changes, that you proposed, not accepted?

When you don’t have a visionary Minister or a visionary Director General of Tourism, it is very difficult to implement any changes.

There is so much that can be done to market tourism in India properly. For example, in Rome and Greece, tourism authorities charge large amounts to people who want to participate in archaeological work or expeditions. They not only get their work done, they make money from it. In India, we don’t have any such things.

In Buddhist heritage, every second stone is considered a monument; even the temples in Mahabalipuram and this is of great value to a lot of pilgrims. For example in the Buddhist sites at Sarnath and Piprahwa, there is a casket of Buddha’s ashes over which a stupa has been built. A miniature of such a casket which a sprinkling of the soil from these religious sites would make a great souvenir for these people. I suggested this and even made one to give Mr. Obama which he appreciated but no one in India does.

Are there any such marketing activities that the Aga Khan Foundation plans to involve itself in?

As a foundation, our role is limited and we have a limited agenda. We are not responsible for the marketing of these facilities and commercial activities. They should be taken up by the responsible state departments and departments of tourism.

Everything should be brought under one umbrella and tourism activities need to be integrated better. In the 8 states of India that I have worked in, I have had to fight my way through the administration everywhere.

It is good that foundations like ours are involving themselves in such activities. I don’t believe any other foundation does quite the kind of work we do. A lot of NGOs are also there but they have now become a business where it was earlier an interest in social improvement.

Mr. B.S. Reddy

Joint-Director of AP Tourism

In 1999, the State Department of Tourism appointed World Class Consultants including the WTO, KPMG etc. In the report they submitted, they pointed out the following which led to a shift in tourism policies in Hyderabad.

How does it compare to other international cities like Kuala Lampur and Amsterdam?

In 1999, Hyderabad didn’t even have an international airport which raised the important question of how people were going to come. This was remedied with the building of the Rajiv Gandhi International Airport, India’s first privatized airport in Shamshabad, Hyderabad managed by GMR which is very well managed today.

They also wanted to enhance specific characters if Hyderabad. This led to a focus on the IT hub in the Hitech city area near Appendix B: Interviews
Madhapur. MICE (Meetings, Incentives, Conferences and Exhibitions) was a new concept that was growing in the world and which they suggested that Hyderabad adopt. For this Hyderabad needed to focus on hotels, convention centers and exhibition centers. Again, this was responded to by building the Hyderabad International Convention Center (HICC) in Hitech City, the first of its kind of India. There are several other initiatives which have been taken up as Public Private Partnerships, for e.g. with the EMAR group of Dubai.

Some other projects and initiatives that AP Tourism has taken up

Necklace Road: It is the only place in India where a lake divides two cities and the area all around has been developed as an entertainment zone with Jal Vihar, Eat Street, IMAX theatre, shopping malls etc. where Hyderabad has embraced a more metropolitan culture.

Charminar Pedestrianization/ Restructuring of the Historic Core

This was initiated in 2001. It was in response to an incident where a piece of the stucco from the Charminar fell down, which the government took very seriously. A study was conducted and it was found that the place was overcrowded where all kinds of traffic were allowed right up to the monument, including heavy vehicles and buses which creates a lot of stress for the monument.

This led to the creation of inner and outer ring roads and buses have currently been relegated to the outer ring road only. It took a lot of time to convince the public of the positives of this plan. The government has also been allocated over Rs. 100 crores for the takeover of private buildings to protect the area around the monuments.

There is also a proposed lawn area around Charminar (not yet realized) but this has a lot of hurdles. For example, the police station there needs to be shifted; they have currently identified a building that can be reused as a police station though the shift is yet to happen. The GHMC has also identified and taken some land that can be used for restaurants and public restrooms.

The Laad bazaar or Choodi bazaar area has been completely pedestrianized (although it is poorly implemented with rickshaws continuing to use it and it is still overcrowded).

GHMC has given identity cards to all the vendors who operate in the area and plan to restrict them to particular areas. This was an initiative which faced a lot of opposition from MPs and stuff. The government gets no payment for these vendors and stalls. The government also runs training programs on hygiene and encouraging and providing gloves to these vendors.

The character of the old city is defined by the old palaces like Charminar, Chowmahalla Palace and Falaknuma Palace etc. Heritage walks are conducted originating at the Charminar and going to the different historic sites in the area. There are also religious processions that frequently go through the area and lend character to the area.

Public Private Partnerships

Lots of privatization projects like Snow World etc. Land is given to the private party for 33 years with a build, operate and transfer mode and is renewed if all the rents and fees are paid on time. Apart from the
rent and taxes, the government also gets 2 percent of the revenue (fixed rate for any kind of development).

**Hussain Sagar**

Small cruises run by APTDCh takes around 100-150 people and are used for parties and small gatherings. Aside from Hussain Sagar in Hyderabad, AP Tourism also runs a water fleet of 144 vehicles along with other water activities like water skiing etc. in Vijayawada and Visakhapatnam.

**Hotels**

APTDC runs 64 hotels ranging from 10-70 rooms. Another 15 hotels will be added by March 2015.

**Sustainable Tourism/ Eco-Tourism/ Tribal subplan**

An initiative by the Central Government recommends that 6 percent of the budget should go towards reviving tribal communities. They got 6 crore rupees. Lots of anthropologists conduct participant observations where they go and live with tribal communities to learn more about their practices. An initiative by AP Tourism is that they have developed 10 houses and dormitory units which will be built. These tribal communities will be trained to run these including hospitality skills, culinary skills etc. and then the property will be transferred to them to man as paying guest accommodations. All the income from the property will go to the tribal community itself. The government helps maintain it for a couple of years after which the entire upkeep used to be handed over to them.

**Eco tracks**

These are developed for adventure tourism. People are trained and taught about local flora and fauna, medicinal plants etc. to guide people. They will run carts on the tracks and sell various products. AP Tourism will advertise these carts and the notices should be up on the website by May. These guides will be provided with uniforms and cameras and other equipment.

The people who man these are selected by the Integrated Tribal Development Agency (ITDA) whose aim is to enhance the social and economic state of these tribes. There are 10 project offices of the ITDA and they are given the task of selecting suitable people but are asked to choose from the nearby areas in order that the people feel a greater connection to the project and stay longer.

**NITHM (National Institute of Tourism and Hospitality Management)**

It is founded around 2004-2005 and run by the State Department of Tourism to meet the demands of the growing hospitality industry. They mainly take people from Andhra Pradesh but also from the other southern states. APTDC absorbs most of the people passing out of the institute so many are guaranteed job security.

There are State Institutes of Hospitality at Medak and Tirupati and a branch of the one at Gwalior is going to open at Nellore. Additionally, AP Tourism recognized that there were no institutes for culinary arts so they instituted one at Tirupati, the first of its kind in India.

**Medical Tourism**

Andhra Pradesh is a hub for medical tourism in India and one of the leading
medical tourism destinations in the world. Last year at a doctor's conference, hotels across the city were sold out and there is lots of potential for expansion. Among the hospitals here, only Apollo is recognized internationally and a lot of foreigners come to Apollo for various procedures. But aside from Apollo other hospitals like Global hospitals and KIMS are also making their impact internationally. Particularly the LV Prasad Eye Institute is one of the best for all eye procedures and Dr. Ravindranath at Global hospital is known for kidney treatments and transplants.

Disadvantages

The main disadvantages with the system is the lack of public education and civic sense among people. Now there are excessive hotels.

Mr. Javed Khan

Mr. Javed Khan, an auto driver and guide offered a description of this informal tourism network in Hyderabad. He is very knowledgeable about the Hyderabad area, having lived there all his life. He had previously tried other businesses, one of which took him all the way to Alaska, but after several colleagues of his died in the cold, he chose to come back and pursue this. He currently works as both an auto driver and a tour guide. He describes the way the network is organized, how it operates in the city and the relationships between different participants.

Experience working as an auto-driver

- The government lays down the tariff structure for auto-drivers and they are expected to abide by them

As of December 2013, the minimum meter rate was Rs.16 with additional charges for every kilometer travelled and for waiting time. Auto drivers are unhappy with the charges and unwilling to accept this tariff which does not provide them with an adequate income. They have thus found several ways to beat the system.

- They manipulate the meters

The previous meters were mechanical and could be easily tweaked to run faster than they were supposed to, sometimes up to two or three times faster to overcharge customers. The government after catching on to this has replaced the previous meters with digital meters that are a lot more difficult, if not impossible to manipulate. Every now and then, the drivers go on an organized strike to raise the tariff by 2-3 rupees. Despite government regulations nobody in the city follows the law. A fair share of the earnings of these drivers goes towards paying for fuel whose prices have only been rising, a sizeable portion is also spent on bribes offered to the police. Thus, nobody agrees to run by the meter and complaining to the police is also normally futile.

- They have a love-hate relationship with the police

Although the police may turn a blind eye to the over-charging, they harass them at every available opportunity to extort money from them. Auto drivers normally operate within defined areas. They have agreements among themselves to only operate within specified geographies of the city so as not to offer competition to other auto drivers. Any particular driver who defies this agreement is normally kicked
out forcibly from the union or his life is made very difficult. Some policemen in cahoots with particular groups, force some drivers to operate in certain areas of the city only and threaten to book them under false charges if they refuse to cooperate.

**Experience working as guides**

- There are different kinds of tour guides, those employed by AP Tourism, history guides and so on and the amount they are paid often depends on how knowledgeable they are and how well they speak English. Javed Khan with his smattering of English has a definite advantage over the other guides who are limited by the local language only. Tourism however, is highly seasonal in Hyderabad with the peak seasons coinciding with school breaks; between May and July and then again in December-January. This makes it necessary for all tour guides to have additional jobs to generate income and the most common of these jobs is owning and driving an auto. AP Tourism has given a few people autos of their own but since they are then forced to operate on a limited budget, many people prefer to buy their own autos.

- They have learnt to cater to different demographics and can reel out specific preferences of people in different age groups and different income brackets. The most popular tourist spots in their experience are the Golconda Fort, Ramoji film city, Chilkur Balaji temple, Hussain Sagar, Dholari Dhani Rajasthan village, Mount Opera Water Park. Families generally favour locations that offer group activities, like the Ramoji Film City and water parks; a lot of them complain about Snow World not being worth their money. Older people in comparison like places that have historical or religious significance.

- Some of the best money is made by tour guides where they escort families or groups in their vehicles. The charges for guiding services start from Rs. 250 for an entire day (from 9 am to 9 pm) but are frequently higher – anywhere between Rs. 300 to Rs. 500 – depending on the size of the group and duration of service. They often ask more from foreign tourists who can afford to pay more. During the peak season, when larger groups of 40-50 people such as college students arrive, the charges are raised even further. Group tours are a lot more profitable since the rates are fixed and there are absolutely no costs involved. In fact, if happy with their services, tourists often tip them well and even pay for their meals during the day.

**Tie-ups with hotels and others for the purposes of advertising**

- In the absence of any formal advertisement for their trade, these guides rely almost exclusively on word-of-mouth. They have tie-ups with different hotel owners and work out an arrangement that is mutually beneficial: they pick up people who are new to the city or on visit for a few days from the railway and bus stations and take them to suitable hotels as per their needs. Getting accommodation in
the city is easy, even without a reservation; a variety of hotels catering to every income bracket have sprung up around the railway and bus stations. Good hotels within the city charge a minimum of Rs. 800 as tariff for a room although a discounted tariff of around Rs. 650 might be available in some places. However through the informal network, rooms of the same quality and standard can be obtained for Rs. 250–300 especially near Nampally station. Owners of these hotels are also reliant on this informal network to get a regular stream of occupants. For people traveling alone, safe and clean, lodge or hostel style accommodation is also available for around Rs. 80 that the auto drivers can take them to.

- The auto drivers are well informed and can discern between good and bad hotels, for e.g. hotels ahead of the bus stand are known for encouraging alternate businesses like drug peddling and prostitution and are considered unsafe, particularly for women. Auto drivers have tie-ups with hotels for a small amount of Rs. 50 – Rs. 100. Hotels in turn recommend the guide services of these very auto drivers and distribute their business cards and numbers to their clientele. They have similar affiliations with other sought after businesses such as the pearl shops in Hyderabad which are popular among tourists. These business owners additionally distribute new clothes and sweets during festivals like Diwali and Dusshera to their long term associates. This setting works well for all people concerned right from the customers who get a good deal; to the hotel owners and businesses which get a continuous inflow of customers; and these guides whose services get promoted.

- With this system, they normally make an easy Rs. 400-500 per day in profits after paying for all other associated costs like fuel.

Government support and funding

Despite the prevalence of this very large and organized informal network, they get very little recognition or support from the government. One of the biggest challenges they face is in purchasing their own auto-rickshaw. Although there is a cooperative bank which has been set up especially for the purpose of facilitating such purchases, it doesn’t function the way it is supposed to. The cost of a new auto-rickshaw is around Rs. 173,000 with an additional Rs. 1,500 to 3,000 for the meter. These cooperative banks are supposed to collect Rs. 30,000 as advance and the remaining Rs. 140,000 in monthly instalments of Rs. 6,300 at a very, very low interest rate. However the beneficiaries have to make repeated rounds of the cooperative banks and more often than not, work never gets done. However, after the government has locked the lending rates of private financers, getting funding from them has become more hassle free. The previously charged interest rate of 1.5 to 1.7 percent has since been reduced to 1.2 percent, thus making borrowing from them better and easier.
Other challenges

- The traffic police stop all vehicles that have an outside city registration and book them on random pretexts, unless they are given bribes. The bribe amounts vary anywhere between Rs. 100-300.

- They are restricted by other auto-rickshaw drivers, for e.g. diesel autos are not allowed to operate within the main city due to pollution concerns; they are forced to operate near the outskirts or in specific districts of the city. In turn these drivers establish their authority in those designated areas and do not allow others to drive autos there. There have been instances of friends getting beaten up by other drivers but the police generally refuse to lodge a complaint.

- Although the monthly income is decent, it is still very difficult to own property with the high rates. Instead they opt for buying small, one bedroom houses on the outskirts of the city where land prices are considerably lower.