

INTERNATIONAL TOURISM IN INDIA: Strategic Significance, Gaps and Vulnerabilities

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ABSTRACT

India initiated economic reforms as an aftermath of a serious foreign exchange crisis. The number and the pace of reforms have been increasing ever since. The scope of external liberalization has increased many-fold in several fields, with difficult withdrawal conditions under WTO agreements. Despite all these efforts, the Balance of Trade continues to be adverse, and so is the case with balance in the current account, if the private transfers were not supporting the same. Even then the Balance of Payment position can not be said to be satisfactory, if one takes into account the transfers in capital account and the external debt position, the latter having crossed U.S. \$ 100 billion mark in the year 2002.

The next round of negotiations at WTO is due soon, in which GATS, including Tourism, is likely to be an important item. International Tourism is a U.S. \$ 4 trillion plus service sector, growing at an average rate of 10% per year. The importance of it for India can be realised from the fact that a 2.5% share in even one year can wipe off India's total external debt and an increase by 0.25% share can more than off set the adverse balance of trade, and ease foreign exchange pressure on the economy.

If India wishes to negotiate and open Tourism sector further to benefit from the international tourism business, it has to think strategically and gear up internally to develop appropriate physical, human resource, and other organisational infrastructure in an **integrated manner**, which can meet the varied needs of international tourists. Failing this, if the tourism sector is opened further for the external players, India may become only a minor tool in the value creation process in the international tourism business in India. It must prepare for playing the role of the main player, who not only helps in enhancing the value creation, but also captures and controls the value created. The major benefits otherwise would be captured by other international players.

The paper points towards several strategic inadequacies, gaps and vulnerabilities that are typically observed in the process of management of tourism in the country, which need to be attended to. The paper also indicates the need for strong, scholarly, analytical support required for the purpose, which can be extended by the academicians in the country.

8.0 INTERNATIONAL TOURISM IN INDIA: Strategic Significance, Gaps and Vulnerabilities

8.1 Introduction

India initiated economic reforms as an aftermath of a serious foreign exchange crisis. The number and the pace of reforms have been increasing ever since. The scope of external liberalization has increased many-fold in several fields, with difficult with drawl conditions under WTO agreements. Despite all these efforts, the Balance of Trade continues to be adverse, and so is the case with balance in the current account, if the private transfers were not supporting the same. Even then the Balance of Payment position can not be said to be satisfactory, if one takes into account the transfers in capital account and the external debt position, the latter having crossed U.S. \$ 100 billion mark in the year 2002.

The next round of negotiations at WTO is due soon, in which GATS, including Tourism, is likely to be an important item. International Tourism is a U.S. \$ 4 trillion plus service sector, growing at an average rate of 10% per year¹. The importance of it for India can be realised from the fact that a 2.5% share in even one year can wipe off India's total external debt and an increase by 0.25% share can more than off set the adverse balance of trade, and ease foreign exchange pressure on the economy.

If India wishes to negotiate and open Tourism sector further to benefit from the international tourism business, it has to think strategically and gear up internally to develop appropriate physical, human resource, and other organisational infrastructure in an **integrated manner**, which can meet the varied needs of international tourists. Failing this, if the tourism sector is opened further for the external players, India may become only a minor tool in the value creation process in the international tourism business in India. It must prepare for playing the role of the main player, who not only helps in enhancing the value creation, but also captures and controls the value created. The major benefits otherwise would be captured by other international players.

To understand the strategic gaps and vulnerability, it is necessary to revisit three basic concepts, the concepts of (tourism) business, strategic management and value creation, value capture and value control in the (tourism) business.

8.2 *Concept of Tourism Business*

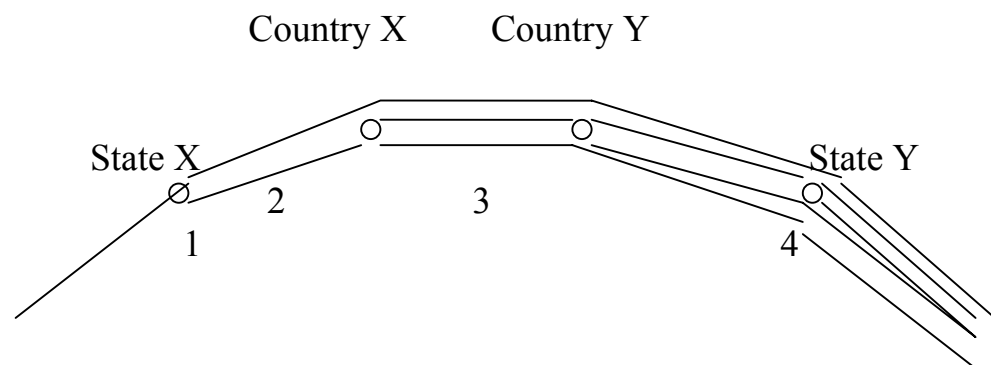
What is tourism? Oxford dictionary defines *tourism* as the commercial organisation and operation of holidays and visits to places of interest. *Tourist is a person who travels for pleasure.* The word *Tourist* does not encompass all kinds of persons who are on tour. The meaning of the word *tour* includes:

- (a) A journey for pleasure in which several different places are covered.
- (b) A short trip to view or inspect something.

The word tourism and tourist relate only to part (a) and not (b). *This distinction is important to bear in mind* because although some of the needs of the two are apparently common, like stay and travel arrangements, they are qualitatively different. Furthermore, some of the needs of (a) are not common with those of (b) mentioned above. *Mixing the two conceptually, leads to creating an infrastructure, which serves some of the need of both, but ignores many of needs of tourist.* Gradually the pressure of capacity utilisation leads to focus on the latter and in operational terms the very *concept of business changes from tourism to hospitality, transport etc.*

8.3 *The Value Chain of Activites in Tourism Business*

Developing from the concept of tourist, in physical terms, the gamut of activities relating to international tourism business can be charted out as below.



Place of origin
of a tourist ○

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Place(s)

of

his interest
(destination)

- Language
- Currency

- Level of Familiarity

At each of the nodal points, the international tourist may require arrangements for stay, food and travel. These are common to the people who are on business/official tours also, but with several differences, the expenses in the latter case are not to be borne by the person himself (office bears it) unlike the case of tourist. It is also not done as per entitlement. Tourist ***has to optimise his expenses***. Further, there is a marked difference in the level of familiarity with the place of visit (especially on the subsequent visits) and the responsibility for making various arrangement lies with office, not with the person himself.

The distinction does not end there. Tourist is not going to complete a job. His visits are determined by the attractiveness of the place. Attractiveness of the place could be natural phenomenon (like Niagara Falls) or manmade on like Eiffel Tower or Disney Land.

Needless to add, tourists do not go to destination to gain theoretical or visual knowledge of it; which they can do even by being at their place, thanks to technological development in the present internet era. They come to experience it, personally, in the total setting. In this context the ***arrangements of foods, stay (and travel) too can add to*** attractiveness, if they are unique, tasty (comfortable) and hygienic (safe and affordable).

It may be noted that ***as the distance between the place of origin and the destination (place of interest) increases, tourist tends to visit larger number of sites/spend larger number of day to maximise satisfaction from the amount of money and time spent***. It is rare for an international tourist to come and see just one place, spending thousands of rupees (equivalent) and several days in travel. ***He then starts seeking package*** of places of interest.

Packages are sought not only in terms of sites, but also services (stay, food and travel etc.), cities/ states and groups of people to enhance pleasure together and guard against lack of familiarity.

There are *other needs too, which are not easily realised* such as availability of necessary amount of money as and where required. The tourist needs to know the details of the site, its attractiveness *as well definitiveness and the ease of making arrangements* for travel, stay and food. Over and above this, *the requirements of certainty, reliability and prompt information about disturbance causing events also assume significance for him*. An additional demand arises on account of differences in languages.

The above *does not purport to be a comprehensive and exhaustive, but only an indicative list of all the needs of tourists emanating from different origins and conveys the variation in the nature and magnitude of requires as the distance between place of origin and destination increases*. These need to be elaborated and prioritized through research studies.

The significance of the above *discussion lies in the fact that these requirements of the tourists get determined by the definition of target in terms of place of origin and the demographic variables of tourists*. The requirements of tourist from Kenya would be different from those of Sweden, the requirements of senior citizens as tourists would be different from the adolescents. *The preparation required to be made for attracting tourists and catering to their needs at the destination may go haywire, if the customer requirements are not properly defined before hand*.

The *uniqueness of tourism business lies in the fact that it is not a single service, but involves a large variety of different, exclusive and specialized services*, which can be provided by different group catering to hospitality, transport and travel, unique, attractive site etc. *There is thus, an additional task or business: that of integration of these services*. For example, the tourist would like to know about the places he may like visit, and as he goes to decide it, he wants whether accommodation and travel reservation within his budget are possible and if so, could he have them confirmed. Any loose link in the entire value chain of services needed by him, may jeopardize his plan and pleasure. *He is willing to pay the price for the role of integrator is ensuring certainty and reliability*. The *success of tourism business perhaps depends as much, if not more, on this integration aspect*, as the quality and variety of the specialized saves of transport, accommodation etc.

8.4 Value Creation, Value Capture and Value Control in Tourism Business

The value chain of tourism business starts from the activity of identifying the customer, presenting them the attractiveness of destination in an interactive manner, helping him in travel, accommodation & other reservations, helping in money transfer etc, and actually taking to and entertaining him at the destination site, besides taking care at nodal, transit points. The total money spent by a tourist is the total value created in the tourism business. Income from impulse purchases like specialities, memoirs etc. and ***all other money spent by him on account of his “pleasure travel” constitute the total value² added*** in the tourism business.

The sharing or capture of the total value created by different service providers depends not only upon the absolute quality of service provided by individual supplier, but their ability to control it. It is much the same way as in the case of computer hardware sales. Out of a total price of a PC say Rs. 40,000, half of it is captured by the supplier of processors and mother board etc. With every effort to assemble and sell a PC, the sale of processor is assured. Though a high amount of efforts are required to assemble and sell PCs, the major value is captured by processor supplier and it can strategically control the entire sales.

The same may turnout to be the case of Tourism also if due care is not taken to develop adequate safeguards measures when the sector is opened for the foreign players. Further discussion on the issue is deferred to a later section.

8.5 Strategic Management

The concept of strategic management can help in analysis of strategic gaps with reference to management of International Tourism in India. Strategic Management can be understood by looking at the types of managerial decisions. Ansoff³ has classified the organisational decisions into three broad categories; namely, the strategic, the administrative and the operating decisions. The strategic decisions (covered under strategy formulation) are concerned with the issue of setting the direction in which the organisation will move or the course that the organisation would follow in the future. These cover the decisions regarding the organisation's mission, objectives and the strategies (i.e., the product/ market scope).

The administrative decisions (commonly referred to as strategy implementation), on the other hand relate to the task of gearing up the existing set-up i.e., physical, human and organisational infrastructure to meet the requirement of business/operations in the future. Typically they cover such issues as the resource allocation, changes in the organisational-structure, systems, skills technology, organisation culture and key functional policies. Taken together they cover the entire scope of strategic management function. Finally, there are operating decisions concerning various transactions or the actual operations. Strategic management deals with decisions that fall in the strategic and administrative decision categories mentioned above. Strategic management may be defined as a stream of decisions and actions which lead to the development of effective strategy or strategies to help achieve corporate objectives⁴.

Strategic management may thus be called as a process by which the top management determines the long term direction and performance of organisation, by ensuring that careful formulation, proper implementation and continuous evaluation of strategy takes place⁵.

It is necessary here to explain the concept of corporate strategy. Corporate strategy can be defined as "a statement of organisation mission, objectives, strategy, policies and major plans and programmes of actions, described in a way that conveys what business we are in and why are we in this business"⁶. This definition brings out the need for organisational clarity about the mission, objectives and strategies, to integrate or unify the organisational efforts. Corporate strategy may, thus, be understood as the outcome of strategic formulation process.

8.6 The Strategic Gaps

8.6.1 Gaps in the Concept of Business

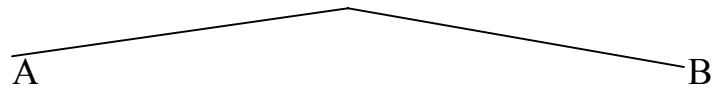
As mentioned earlier, the strategic management forces the management to be clear on what business an organisation is in. Strategic management concerns with two significant discussions related to a future of an organisation. These are:

- (i) What business the organisation would be in the future (in terms of products market scope) and why?

- (ii) How it proposes to gear up to meet the requirements of physical infrastructures, human resources (skills, style etc.) and organisational resources (structures, systems, shared values etc.) of the future business?

As elaborated in an earlier section, the value system of tourism industry tends to encompass all the services required from the place of origin of the international tourist to the destination. The total gamut of services that need to be provided can be broadly classified into two categories.

- A. Promotional and developmental (to induce, attract bring tourists from his place of origin to the state of destination).
 B. To cater to his requirements once they reach the place, to help them gain memorable experience of the visit.



- A
1. Knowledge of
 - * Tourist places and their attractiveness
 - * Availability of proper
 - Accommodation
 - Transport/Carrier
 - Food
 - Accessories
 - * Money Transfer facilities
 - * Booking/Reservation
 2. Assurance of the
 - * The above arrangement
 - * Safety /security
 3. Helps and guidance in case of exigencies

- B
1. Actually providing on their arrival at different places, the facilities of
 - Accommodation
 - Food
 - Transport
 - Communication
 - Money Exchange facility
 2. Providing facilities for site seeing/ shopping etc. as promised
 3. Providing timely guidance for any change in programme needed on account of emergency/ exigencies
 4. Assistance of interpretation to overcome problems arising on account of difficulties language barriers

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The *first major strategic gap that is stunning one, is observed in the concept of business itself.* At present, the country seems to be geared only for entertaining the international tourists on their arrival, focusing on activities related to “B” part mentioned above, *rather than focusing equally on inducing and attracting international tourist to India.*

A visit to tourist developments corporations will reveal the glaring nature of this gap. An international tourist can not know and get the services relating to “A” part from the place of his origin. The websites of different tourist corporation are not integrated even for information, leave alone providing other services, like booking/reservation of accommodation, air/rail ticketing etc. Each website seems to be quite independent of other and does not provide information in an integrated, building block manner.

8.6.2 Customer Segmentation Gaps

The international tourists are taken as a homogeneous group. The word “international” is thus used loosely rather than identifying and focussing on different geographic and demographic segments to develop appropriate infrastructure to uniquely meet the requirements of different tourists segments. This is exemplified by the publicity material that is available in English Hindi or other vernacular language which can not meet the requirements of a nature German, Swiss, French, Italian, Spanish Swede, Dutch or other European tourists. *One may be surprised to learn that the hotels, reservation and such other agencies may not even know from where is the potential market, USA, Europe, Japan, Kenya or Singapore.* A knowledge of the fact that the biggest chunk in the international tourism is constituted by European tourists, may considerably help in sharpening and focusing strategy⁷. Efforts are made to design Buddha Circuit, Taj Circuit etc. But these may not be items of common/ equal level of interest to international tourist from Japan and Europe. Same is the case of lack of understanding about their demographic patterns. For example, there seems to be no cognition of the fact that there are different segments by age group and that the requirements of each age group is different.

8.6.3 Lack of Clarity on Objectives

The individual services providers like hotels, airlines etc. cater to tourist alright, but they can not be sure of attracting them because all by themselves they can not determine it. The tourism development corporations were expected to do the job. ***But a typical list of objectives would indicate that they had various activities listed to entertain the tourist ones they come to country***⁸. There is no mention that they wish to earn foreign exchange and bring more tourists from different parts of the globe. They thus reduce themselves to play the role of individual service provider, concerned primarily with increase in their capacity utilisation through variety of customers, rather than gearing up to bring the international tourists here.

8.6.4 Gap in Integration Value Chain Activities

The essence of strategic management is not only futuristic but also ensuring integration; ensuring that the requirement of infrastructures and operations for international tourism in India are properly taken care of. Presently there seem to be lot of gaps in the inter-linkages between various services. ***The hospitality industry (hotels etc.) treat tourism more as an add on activity.*** The local site seeing is some what better connected in physical terms, but ***there is little standardisation and assurance of quality of service.*** The international money transfer facility is not provided by any domestic agency. ***The list of certified hotels and guest houses is not available to the tourists except through foreign travel agencies There is little or no inter-connectivity across various service providers and across the states***⁹. The international tourist has to decide various arrangements before commencement of journey. But at present an international tourist ***may not even know about tourist facilities available at different sites, directly from any domestic, Indian travel agent and other players.*** He has to reach the country before he decides finer details. There is no integrated system to let international tourist get successive levels of information. ***There is no single agency to take care of missing links and ensure integration of various services as a cohesive whole, rather than presenting services in a fragmented manner.***

Objectives of A State Tourism Development Corporation

1. To promote, take over, develop, start, purchase, construct, take on lease, maintain, manage and operate hotels, restaurants, motels, travellers' lodges, guest houses and other places for the purpose of boarding, lodging and stay of the tourists; canteens, cafeteria, places of tourist interest like wild life

- sanctuaries, beauty and recreational places like parks, avenues and galleries, handicrafts emporia, establishments, undertaking enterprises and such other activities of any description with a view to develop, facilitate and promote tourism in the state.
2. To enter into any arrangement for taking over any or all of the assets and liabilities of any department of the state government or of the Government of India connected with the development of tourism and in particular as a going concern all or any of the Tourists' Homes/State government Guest Houses/ Travellers' bungalows and catering establishments already established and maintained by the state Government or by the Government of India in various places and to run the same with the object of promoting tourism.
 3. To establish and manage transport units, travel and transport counters, import, purchase, lease and run or otherwise operate buses, coaches, trucks, launches, ropeways, aircraft, helicopters, inland, waterways and other modes of transport and to act as travel agents for airlines, railways, shipping companies etc.
 4. To produce, distribute and sell tourist publicity materials; edit, design, print, publish, sell or otherwise deal with books magazines, periodicals, folders, guide books, pamphlets, bills, posters, picture post cards, diaries, calendars, slides, cinematograph films and other materials for the purpose of giving publicity to and developing tourism.
 5. To provide, arrange or conduct entertainment for tourists by way of cultural shows, dances, music concerts, cabarets, ballets, film shows, sports and games, son-et-lumiere spectacles and others.
 6. To provide or arrange shopping facilities for tourists, establish or manage shops including duty free shops, emporia and other places for selling travel requisites and other articles of tourist interest.
 7. To carry on the business of restaurant keepers, wine and spirit merchants, licensed victualers, theatrical agents, box office keepers, concert room proprietors, hotel keepers, dramatic and musical publishers and printers and any other business, which can be carried on in connection with any of those objects as may seem calculated to render profitable any of the company's property and rights for the time being.
 8. To establish art galleries for the exhibition of paintings, engravings, sculptures, jewelry and other works of art and to buy, sell and deal in works of art of all kinds.
 9. To acquire land and construct, develop and maintain wayside amenities and picnic spots.
 10. To organise or conduct all inclusive tours by roads, rail, sea, air or otherwise and to enter into agreements for this purpose.

The task of ensuring appropriate integration is not so difficult in the present internet era, But major players who can effectively play the role of integrator such as State Bank of India , Bank of Baroda, etc. who have large network of branches both in India and abroad and also have close interaction with railways, airways, hotels etc. for other businesses, are feeling shy of entering the tourism business and playing critical integrative role and really make tourism a money spinning and foreign exchange earner.

8.7. Strategic Vulnerability

The fact that tourism world wide is a U.S.\$ 4 trillion business, opens up great opportunity for India to benefit from it in terms of earning foreign exchange and mitigate adverse balance of trade account. ***An increase of 0.25% share in the international tourism business can overcome the pressure of earning foreign exchange that has to be arranged through***

high interest bearing bonds and deposits, which add to self perpetuating crisis.

The potential business may be lost if India does not gear up to bridge the strategic gaps mentioned above. Worse still these potential may be exploited to the hilt by the foreign players by bridging the gaps. Despite huge international tourism business in India, the country may not benefit in terms of getting foreign exchange as the same may be appropriated by them. The booking of international travel may be done by foreign carriers and exchange and commission associated with transfer of money may be appropriated by the international players like American Express, Thomas Cook etc, using Indian labour only. Even the booking of hotels may be done in foreign country and the foreign exchange may not flow to India. *A big chunk of total value created in the tourism business in the form of travel, accommodated money transfer, even shopping may be captured by the strong armed multinational player with world wide network and Indian service providers reduced to play only second fiddle.*

Some recent *studies show that the country has not gained benefits as expected by opening of Indian economy* in terms of reducing international trade gap¹⁰, technological capability building¹¹ and globalisation¹² or enhanced global competitiveness and ability to earn foreign exchange on its own¹³. The same may happen in the tourism sector if it opened without necessary ground work.

Action Strategies

International tourism is an *extremely tempting proposition in terms of potential of business especially foreign exchange earnings, for opening of tourism sector in the next round of negotiations. It may, however, turnout to be a mirage* if the sector is opened without adequate preparation to gear up the strategic gaps. India currently is not geared to reap the advantage of first movers. Hence must avoid straight jacket opening. *It has to fine tune this gearing up with speed of opening tourism sector as per the provisions of negotiations at WTO. It has to carefully examine when and how much to open through (almost irreversible) specific commitments and what should be limitations put into effect to achieve this fine tuning.*

The preparations for exploitation of international tourism business *require as much attention of the government and industry as of the academicians.*

The governments need to play the first level integrator role in terms of setting priorities and expectations from the international tourism business. It has to play the role of promoters, persuading different providers (to bridge the gaps), who have not come forward to play the role like the banks. The industry has to *develop mechanisms to ensure strong linkages among various service providers to make it an integrated whole*, rather than behaving like a large number disjointed service providers. The academicians have to *provide strong analytical support through research studies for identification of missing links in providing various services, pointing conceptual confusion in mission, objectives and strategies*. In a nutshell the international tourism business has to be considered in its entirety by the three major contributors.

8.9 Issues for Future Research

The paper highlights the need for several types of in-depth studies required to gear up for benefiting from the growing international tourism business. Firstly, there is a need for *study of international tourists needs (especially those related to the promotional and developmental aspects* explained in section 3 of the paper) coming from different geographical areas. There is also a need for *studying the appropriateness of existing infrastructure in light of the needs identified to understand the degree to which the present infrastructure is adequate or inadequate*. Only the in-depth studies can show whether there is need to focus more on utilisation of infrastructure already created rather than creating new ones. The country has paid a huge price in the race for creating assets in the nineties in various sectors of industry leading to excessive infrastructure created in the industry sector as a whole. The mistake does not need to be repeated once again in this sector.

There is also a need for validating the *strategic gaps identified in the concept of business*. This will help in identifying to what extent the thrust of tourism strategy in India has been a lopsided one; focusing mainly on entertaining the international tourists who have come to India vs. bringing them to India and its different states. *Studies are also required to ascertain the nature and level of efforts and investment required for bringing the international tourists to India*. Further, *studies are also required to clarify the strategic focus of tourism industry; how much domestic and how much international tourism and why?*

Studies are also required to clarify the assumption of considering all the international tourists as a homogeneous group. Are there demographic segments that can help in designing the infrastructure in a better manner to meet specific and varied requirements of different segments?

There is yet another set of studies required to *identify the missing links in the tourism business at the country, state and city level that need to be taken care of?* There is also a need for ascertaining *whether tourism in general, and international tourism in particular, is being considered as an integrated business or an assortment of hospitality, entertainment and travel businesses by various players in the field.* If so, what is the consequence of it in terms of loss of tourism business in general, and international tourism business in India, in particular.

Last but not the least, there is a need for studies to understand *how much of the value created in the international tourism in India is being captured and retained (especially the foreign currency part) in India and how much of it is captured and repatriated out of India by the international players.* This is important as if due care is not taken then India may not benefit in terms of foreign exchange earning from this lucrative sector, what is a key consideration in negotiation at WTO for opening this sector.

8.10 Conclusions

International tourism is an *extremely tempting proposition in terms of potential of business especially foreign exchange earnings, for opening of tourism sector in the next round of negotiations.* If India wishes to negotiate and open Tourism sector further to benefit from the international tourism business, it has to think strategically and gear up internally to bridge the strategic gaps and develop appropriate physical, human resource, and other organisational infrastructure in an **integrated manner**, which can meet the varied needs of international tourists. Failing this, if the tourism sector is opened further for the external players, India may become only a minor tool in the value creation process in the international tourism business in India. It must prepare for playing the role of the main player, who not only helps in enhancing the value creation, but also captures and controls the value created. The major benefits otherwise would be captured by other international players

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