



सत्यमेव जयते

Government of Rajasthan

**Chief Minister's Rajasthan Economic
Transformation Advisory Council
(CMRETAC)**

DEPARTMENT OF PLANNING, RAJASTHAN

**QUANTIFICATION OF INTANGIBLE
CULTURAL ASSETS**



indic
ASSOCIATES

**Technical Support Organisation
CMRETAC**

2022



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**Chief Minister
Rajasthan**



MESSAGE

Every state is important in the scheme of national development. We cannot assure the progress of India without the progress of the states. The Constitution binds us in a federal polity where every order of the government (Union, State and Local) has an important role to play.

State governments are certainly closer to the people and hence bear an enormous responsibility towards ensuring effective delivery of goods and services. In this endeavor, they have a direct, indirect and enabling role to play. Rajasthan is committed towards that goal and has been at the forefront of many reforms since long. Our sincere and unceasing efforts, during the pandemic and otherwise, have been recognized widely.

The Bhilwara COVID-19 containment “model” has been recognized as a replicable model globally. Ours was also one of the first states in India which came up with a comprehensive strategy for economic revival in the wake of the pandemic. Besides taking a plethora of immediate steps to extend social and economic relief to the people during COVID-19, Rajasthan has also introduced several transformative measures in the recent past to boost the economy of the state. Rajasthan Investment Promotion Scheme, 2019; Food Processing Policy, 2019; Tourism Policy, 2020; MSME Facilitation Act, 2019; Handicraft Policy 2022; and Rajasthan Investment Promotion Scheme, 2022 are some of the path breaking initiatives.

We have also started the practice of 'thematic' annual budgets for converging our efforts and energy on most pressing issues and have ensured that governance is truly decentralized. Our recent campaigns on 'Prashasan Shehron Ke Sang Abhiyan' and 'Prashasan Gaon Ke Sang Abhiyan' are examples of that spirit.

While our efforts are incessant, we are also aware that nation-wide structural slowdown of the economy and recurring shocks like the recent pandemic, call for an even greater effort. Towards this end, the state government in March 2020 set up Rajasthan Economic Transformation Advisory Council under my Chairmanship with the mandate to suggest robust and resilient economic restructuring for the state. To ensure

that the Council gets best possible advice, we invited eminent dignitaries and experts as members of the Advisory Council.

I am pleased to state that the Council has delivered a set of nine policy reports across areas as diverse as Fiscal Management; Managing Urban Informal Sector; Integrated Agro-Business Infrastructure; Sustainable Agriculture; Doing Business; Quantifying Intangible Cultural Assets; Education and the New Paradigm (bridging digital divide); Medical Services; and Public Private Partnership in Infrastructure. These policy areas may appear to be separate and discreet but one commonality that binds them all is that they are truly geared towards a bottom up approach to the development of the state. I urge my colleagues in the state government to also focus on inter-linkages in these policy areas for the best possible outcome.

While the Council is still at work with many new emergent areas that deserve attention, I am happy to state that the present policy study is very much a part of this endeavor.

I am grateful to the Members of the Council, my Ministerial colleagues, officers of the Government, all collaborators and organizations who have worked tirelessly to make this possible. My special acknowledgement of Shri Arvind Mayaram, Vice Chairman of the Council, whose leadership and contribution towards this endeavor has been extremely valuable. My appreciation is also to the entire team at the Council who have diligently worked to put these reform oriented reports together.

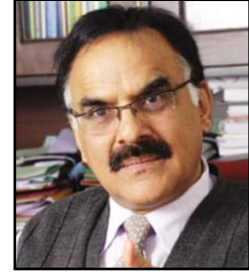


(Ashok Gehlot)



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**Economic Advisor to CM
& Vice Chairman
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Transformation Advisory Council**



FOREWORD

Intangible Cultural Assets (ICAs) are heritage wealth, and refer to shared inter-generational knowledge, skills and customs. While ICAs give a sense of identity to individuals, communities and geographies, they are also constantly buffeted by evolving consumption preferences. This makes it important to assess how ICAs contribute to economic well-being of their practitioners and economy of the state.

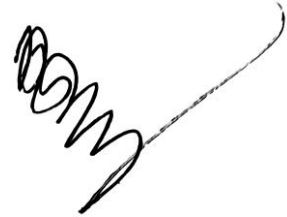
For Rajasthan this is even more significant as the state's economy has been significantly dependent on tourism, which in turn is dependent on both tangible and intangible culture heritage of Rajasthan.

Whereas at a conceptual level, the contribution of ICAs to the economy is acknowledged, very little effort has gone into quantifying the contribution of intangible cultural assets to the economy. Unless such quantification is done, it is difficult to assess the nature and quantum of investments, and regulations that may be needed to promote them.

In this light, Esya Centre, a Delhi based think tank, was tasked to conduct this study on 'Quantification of Contribution of Intangible Cultural Assets to the Economy of Rajasthan'. In many ways, it is a pioneering study as nothing of this nature and depth has been attempted before.

The study adopts a bottom-up approach, wherein ICAs are mapped across key cultural zones of the state and their contribution is quantified on several economic attributes like income generation, consumption, market penetration and export potential et al. The study not only provides a framework to quantify ICAs in an ongoing manner but also articulates actionable recommendations for the state government.

I express my gratitude to Hon'ble Chief Minister for providing continuous support and encouragement and congratulate Esya Centre and all collaborators for putting this timely study. The study would not have been so rich and comprehensive but for the very active and continuous support of all the concerned departments and their senior officers. I also express my gratitude to all concerned Ministers, esteemed members of CMRETAC for their valuable guidance, concerned departments and Technical Support Organization to CMRETAC.

A handwritten signature in black ink, consisting of several loops and a long, sweeping tail that curves upwards and to the right.

(Dr. Arvind Mayaram)

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Finally, any error or omission is solely ours and should not be ascribed to any of the above acknowledged people or institutions.

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EXECUTIVE SUMMARY

Intangible cultural assets (ICA) are heritage wealth and refer to shared inter-generational knowledge, skills, and customs. While ICAs give a sense of identity to individuals and communities, they are also constantly evolving. This process of evolution, with individuals and communities at the center, makes it important to assess how ICAs are contributing to economic well-being. The role of the state in the protection, preservation, and promotion of ICAs, thus, is of paramount interest.

In this light, Esya Centre, a Delhi-based think tank has conducted this study on **Quantifying the Contribution of Intangible Cultural Assets to the Economy of Rajasthan**, under the aegis of the Chief Minister's Rajasthan Economic Transformation Advisory Council (CMRETAC). It is a pioneering study in the country, owing to its state-wide coverage.

Located on the northwestern frontier of India, Rajasthan is endowed with rich and diverse cultural forms. These cultural forms demonstrate developments in the state's history and have a strong bearing on contemporary economic lives. A unique range of traditional craftsmanship, social practices, festive events, art performances, royal architectural structures, and numerous havelis make up the key elements of ICAs in the state. Together, these elements have put Rajasthan on the tourism map globally.

This study adopts a bottom-up approach, wherein ICAs are mapped on the 12 cultural zones of the state. It employs in-depth analysis of secondary literature, on-ground surveys, stakeholder consultations, and review of institutional reports and data for the assessment. The contribution of ICAs is then quantified on several economic attributes, while their qualitative characteristics are captured through case studies. The major highlights of this study are as follows:

Identification and Spatial Distribution

- Men in the age group 16-35 account for the majority of participation into ICAs. There is considerable potential for increasing women's engagement into ICAs.
- Marwar and Gorwar together is the most diverse region for ICAs, followed by the Ajmer and Hadoti region.
- The regional spatial distribution of performing artists has a strong positive correlation with ICA diversity and strong negative correlation with population density.

Consumption

- The key drivers of national tourist footfall include religious and spiritual appeal, traditional art, and the overall rural lifestyle. Locations with good air connectivity and well-developed markets are hotspots for international tourists.

- Tourist footfall correlates strongly with the presence of amenities, infrastructure, and markets, as well as diversity of ICAs.

Market Penetration and Integration

- The most prominent backward-linked industries with cultural activities are public administration, financial services, trade and utilities. The most prominent forward-linked industries are construction, financial services, transportation and storage, and wholesale and retail trade.
- After accounting for industry size, wholesale and retail trade has the largest influence on cultural activities, followed by agriculture, forestry and fishing, and construction.

Employment

- Employment into ICA activities, on account of direct engagements and through linked industries/activities, accounts for roughly 8.12 percent of the total employment pool in the state, which is roughly 2.5 million persons.
- Performing arts, visual arts, and folk arts account for the majority of direct employment into cultural assets, having a share of 31.9 percent, 22.9 percent, and 8.7 percent respectively.
- Almost 70 percent of the artists are professionals, while the remaining 30 percent are non-professionals. Vulnerable employment is found among approximately 72 percent of the total number of artists.

Investments

- Government allocation towards cultural activities – as noted through budgetary allocations to the Department of Tourism, Department of Art and Culture, Department of Archaeology and Museums, and Devasthan Department – is falling.
- Private endeavours, as seen through the number of start-ups, are largely focused on travel and tourism.

Export Potential

- The export of heritage products accounts for roughly 50 percent of Rajasthan's merchandise basket. But its share has been falling in the last five years.
- Relative to the leading export states in the country, Rajasthan needs to rapidly address problems related to export credit, limited air cargo facility, and cluster development.

Income Generation

- The average annual income of artists is nearly 23 percent lower than the annual average per capita income in the state. Moreover, at least 70 percent of artists earn less than the average annual per capita income of the state.

- Per capita income of the state has the strongest association with ICA diversity, while its association with participation in art forms and tourist footfall is low.

Laws and Policies

- Policy-making around cultural assets in the state needs more focus on compliance ease.
- The considerable scope for inter-departmental synergies remains to be explored to improve the effectiveness and inclusiveness of ICA-related rules and regulation in the state.

This report lists out a comprehensive set of policy recommendations for protecting, preserving, and promoting ICAs in the state. Additionally, it echoes the collective voices of stakeholders including representatives from cultural institutions, musicians, visual artists, craftsmen, event organisers, hoteliers, administrators/caretakers of museums and monuments, government officials in the Tourism and the Cultural Department, traders dealing in local genuinity, and culture researchers.

1. INTRODUCTION

Rajasthan is the largest state of India in terms of area and the seventh-largest state in terms of the size of the economy. The state has rich artistic and cultural heritage embedded in several economic and social dimensions. Specifically, intangible cultural assets such as traditional craftsmanship, social practices, festive events, and art performances provide a unique identity to the state. They provide an aesthetic experience that stimulates the state economy through symbolic, cognitive, and social values. As such, an economic appraisal of these intangible cultural assets presents an all-important direction for action at the policy level to promote development.

In this chapter, as the first step towards assessing the role of intangible cultural assets on the economy, we discuss the analytical conceptualization of culture and an overview of the Rajasthan economy. Subsequently, we synthesize the existing evidence on the role of culture in economy. These discussions are intended to set the context for a deep dive into the role of intangible cultural assets on Rajasthan's economy.

Analytical Conceptualization of Culture

Culture forms the superstructure of almost all economic activities and is an integral part of the 'invisible hand' performing these economic activities (Smith, 1776). This metaphoric conceptualization that takes culture as a body of shared knowledge, understanding, and practice, is too broad to be useful for analytical purposes. In fact, most analytical sciences, until the late 20th century, largely ignored the role of culture on economics on the premise that there is no rigour in invoking the evolution of an unobservable. For example, explaining the variation in economic outcomes with differences in policies, institutions and technology, and calling the residual "culture" is utterly unpersuasive. However, the fact that culture matters to economic outcomes, even at some vague level, kept pushing the need for analytically conceptualizing cultural assets. This vagueness stems, in large part, from the absence of a workable design linking culture with economics.

In recent times, some notable attempts have been made to find a persuasive design to link culture and economics. Table 1.1 presents an overview of these attempts. Two points emerge from the discussion in the table. First, culture is a multi-faceted feature in influencing economic outcomes and has as much to do with sustained beliefs and values as the heterogeneity of beliefs and values. Second, not all proxies of culture may aggregate constructively. For example, while intensity of religious belief (as discussed in Barro and McLeary, 2003; Guiso, Sapienza and Zingales, 2005, and Tabellini, 2010) and female labour participation (as discussed in Fernandez, 2007) may both signal different aspects of culture, these proxies may not correlate positively with

each other.¹ So, from a purely analytical perspective, defining culture remains a grey area.

We take an asset-based approach to conceptualizing culture. This method is contingent on an outcome or purpose, and its tangible presence either directly or through an effect. Several advantages accrue to an asset-based view of culture. First, in this way, culture is an aggregation of different elements that manifest shared knowledge, understanding, and practice. For example, cultural elements can include folk dance and music, monuments and other heritage sites, indigenous handicraft, fairs and festivals, etc. These elements have specific and identifiable interactions with economic variables such as marketable value creation, employment generation, consumption, wealth creation, and forward and backward market linkages. Second, besides specific and identifiable interactions with economic variables, an asset-based view also makes it possible to identify the interaction of one cultural element with another. For example, folk dance or music along with indigenous handicraft and a fair may jointly constitute a cultural event, where the network externalities from each of these elements may benefit the other. Finally, from a policy perspective, analysis of these cultural elements offers a nuanced understanding of the requisite focus for their promotion and penetration, levels of investment, and overall legal and regulatory environment.

Table 1.1: Proxies for Culture

Proxy for culture	Source	Argument
Labor union density	Algan and Cahuc (2006)	Labor unions can counteract the potential monopoly power of employers more easily in societies where trust and civic cooperation are strong enough to ensure involvement in collective action. Conversely, the political demand for a statutory minimum wage is expected to be higher when attitudes towards social cooperation do not allow workers to sustain powerful trade unions.
Intensity of religious belief (using survey data)	Guiso, Sapienza and Zingales (2005)	Religious beliefs affect people's attitudes towards the economic system in the way they are crystallized over time, and taught and transmitted from one generation to the next.
Religiosity (using survey data on religious beliefs and attendance)	Barro and McLeary (2003), Tabellini (2010)	Culture influences economic outcomes by affecting personal traits such as honesty, thrift, willingness to work hard, and openness to strangers. This makes religion an important dimension of culture.

¹ Uysal and Guner (2014) discuss a case where religious belief puts a binding constraint on female labour participation.

Proxy for culture	Source	Argument
Societal organisation	Greif (1994, 2005)	Cultural beliefs are the ideas and thoughts common to several individuals that govern interaction between these people, their gods, and other groups.
Industrial occupational choice	Botticini and Eckstein (2005)	The goal of maintaining cohesion and group identity can lead members to prefer to be concentrated in selected industries and occupations.
Female labour participation	Fernandez (2007)	Laggard evolution of cultural beliefs regarding women's role in society led to slow growth in their labour force participation.

With this conception of cultural assets, we follow UNESCO (2003) in distinguishing between tangible and intangible cultural assets:

- ☐ **Tangible cultural assets** refer to physical artifacts produced, maintained, and transmitted intergenerationally in a society. These include artistic creations, built heritage such as buildings and monuments, and other physical or tangible products of human creativity that are invested with cultural significance in society.
- ☐ **Intangible cultural assets** (ICAs) indicate the practices, representations, expressions, knowledge, skills – as well as the instruments, objects, artifacts, and cultural spaces associated therewith – that communities, groups and, in some cases, individuals recognize as part of their cultural heritage. Examples of intangible heritage are oral traditions, performing arts, local knowledge, and traditional skills.

The distinction between tangible and intangible cultural assets is important because they require different approaches for preservation and safeguarding, and the mechanism of their contribution to the economy is also different (UNESCO, 2003). This is, to a large extent, due to the fact that tangible cultural assets have a unique physical form, while intangible cultural assets are constantly recreated. Notwithstanding, intangible and tangible cultural assets are often embedded into people, artifacts, or places. The artistic creations inside a cultural heritage site or a museum are an example of this embeddedness.

The key characteristic of intangible cultural assets (ICA) is that they are constantly recreated, giving them an important place in an economy – a theme we focus on in this report. Specifically, we look at different elements of ICA and their contribution to the overall economy. We follow a bottom-up approach wherein we first list and identify the distribution of each ICA element, along with their spatial distribution.

Subsequently, we quantify the contribution of each ICA element to economic attributes such as their extent of consumption and wealth creation, market linkages and penetration, employment generation, and export potential. Finally, we devise a method of aggregation to estimate the overall value of ICAs. A specific focus is on approximating the qualitative characteristics of these ICA elements, which are often embedded into different strata of the economy such as formal and informal economy, physical and virtual presence, and local, domestic and foreign contributions.

In order to situate these analytical constructs of ICA elements in the overall economic context, we discuss some pertinent results from the literature and an overview of the Rajasthan economy below.

Literature Survey: Contribution of ICAs to the Economy

Table 1.2 presents a summary of key discussions and results on the contributions of ICAs to the economy. Five important points emerge from the table. First, embedding ICAs with tangible cultural assets improves their contribution to the overall economy. In addition, it leads to further preservation of ICAs. Second, the most prominent effect of ICA promotion is a growth in the number of tourists. This, in turn, contributes positively to the economy through all industries in the backward and the forward linkage, and gives a considerable push to employment generation. Third, the government’s primary role in promoting ICAs is to ensure a conducive legal and regulatory environment and improve the state of connectivity infrastructure. A conducive legal and regulatory environment should focus on preserving the authenticity and aesthetic beauty of an ICA. Improvement in the state of connectivity infrastructure includes both, physical and virtual mediums of connectivity. Fourth, ICA promotion, besides having an important role in overall economic development, also promotes regional development. Thus, it is an important leveler in distributing the gains from development. Fifth, investments into ICA promotions typically involve gestation in reaping returns. However, the returns on these investments are typically large, and also involve a hefty non-material social capital component such as increase in awareness, attitudes and actions, and sense of identity.

Table 1.2: Survey of Literature on ICAs and the Economy

Focus	Source	Key Result
Preserving cultural heritage	Bouchenaki (2003)	A threefold approach is important in preserving cultural heritage: (A) holistic heritage approach relating tangible heritage to the communities concerned; (B) Translating intangible heritage into ‘material’ economy such as archives, inventories, museums and audio or film records; (C) Supporting practitioners and the transmission of skills and knowledge.

Focus	Source	Key Result
Contribution to tourism sector	Petronela (2015)	Austria, Spain, Portugal, Greece, and Slovenia have a rich collection of art, culture, and heritage. Tourists spend a large proportion of money on these cultural attributes. For these countries, per capita income is positively correlated to such spending by tourists.
Cultural participation measurement	Bollo et al. (2009)	It is imperative for institutions and policymakers to develop a favorable legal framework and specific cultural participation policies, at both local and national levels. Cultural participation has a positive impact on individual and community experience, attitudes and actions, such as targeting poverty and social exclusion.
Social and economic value of cultural heritage	Dümcke and Gnedovsky (2013)	Cultural heritage, in a broad sense, plays a central role in the cultural economy, while cultural industries play a transformational role in regional development.
Intangible cultural heritage attribution	Heredia-Carroza et al. (2020)	The value of intangible heritage is created majorly by the perception of the viewer and the feelings it invokes in them. For example, ‘make others feel’ and ‘ability to produce emotions’ is brought about by intangible elements such as culture, authenticity, aesthetic beauty, and performances.
Benefits of intangible cultural heritage	Lee (2014)	Using taxes as the instrument, the annual mean willingness to pay for intangible cultural heritage stands at USD 4.53 for the Jeollabuk-do region and USD 4.92 for other regions in South Korea. The annual monetary benefit due to intangible cultural heritage amounts to USD 75.3 million from these regions.
Economic value and social viability of a cultural festival	Herrero (2011)	The ‘Santiago de Compostela Contemplative Music Festival’ in Spain is regarded highly due to its historical, artistic heritage, and religious importance. Tourists attending this festival make up 42 percent of the total attendance, which is a higher-than-average willingness to pay as compared to residents. The social benefit of this festival amounts to 48 percent of the total cost of the festival.

Focus	Source	Key Result
Contribution of tourism	Sharma (2018)	In Rajasthan, tourism benefits sectors like handicrafts, agriculture, horticulture, construction and poultry, while increasing state-wide employment opportunities. Natural beauty and historical importance are the major contributing factors for tourist arrivals.
Tourism and economic development	Saxena and Gupta (2020)	Infrastructure development positively impacts tourist arrivals, while population density and pollution have a negative impact on the overall economic development of Jaipur.
Tourism and economic development	Alam (2019)	Tourism accounts for 15 percent of the Rajasthan economy and provides benefits like foreign exchange earnings, regional and infrastructure development, promotion of local handicrafts, and cultural development. Underdevelopment of transport, communication and logistics, false merchant advertising, and malpractices are key issues negatively impacting the tourism industry.

Overview of the Rajasthan Economy

Table 1.3 presents an overview of the Rajasthan economy on several parameters. The state's position on these parameters suggests considerable scope for a developmental push vis-à-vis the pan-India average and the leading states. The priority areas are level of education, road connectivity, telephone and internet penetration, industrial presence, availability of credit, and employment.

Table 1.3: Rajasthan vis-à-vis Other States

Parameter	Year	Statistic for		Leading	
		Rajasthan	All-states	State	Statistic
Percentage of state area to all-India	2011	10.41	100	Rajasthan	10.41
Percentage of state population to all-India		5.66	100	Uttar Pradesh	16.5
Percentage of urban population		24.9	31.1	Tamil Nadu	48.4
Per capita net value added in industries, INR	2014-15	4,557	7,814	Himachal Pradesh	44,231
Total road length per hundred sq. km. of area (km)	2016-17	77.61	152.02	Kerala	619.18

Parameter	Year	Statistic for		Leading		
		Rajasthan	All-states	State	Statistic	
No. of Banking Offices per lakh population	Sept 2020	10	11	Himachal Pradesh	22	
Per Capita Bank Deposit, INR		57,747	106,713	Maharashtra	229,522	
Per Capita Bank Credit, INR		43,546	76,877	Maharashtra	219,526	
Female labour force participation (usual status), age-group 15-64	2019-20	33.2	28.2	Himachal Pradesh	46.0	
Gross Enrolment Ratio in Higher Education	2020	23.0	26.3	Sikkim	53.9	
Labour force participation rate (15+ age)	2018-19	53.0	50.2	Himachal Pradesh	67.4	
Unemployment rate (15+ age), total		5.7	5.8	Nagaland	17.4	
Employment type, own account worker/employer		42.7	38.8	Arunachal Pradesh	55.3	
Employment type, helper in household enterprise		25.4	13.3	Chhattisgarh	34.3	
Employment type, regular wage/salary		18.1	23.8	Delhi	59.6	
Employment type, casual labour		13.8	24.1	Bihar	33.0	
Dependency ratio		54.5	46.6	Bihar	60.3	
Literacy rate (age: 7+)		72.5	77.5	Mizoram	98.5	
GSDP at constant prices, INR billion		2019-20	6887.1	4480.1	Maharashtra	21340.7
NSDP per capita at constant prices, INR thousand		2019-20	78.4	94.6	Goa	367.2
Gross capital formation, INR billion	2019-20	177.8	143.3	Gujrat	889.6	
Number of factories	2018-19	9424	7129	Tamil Nadu	38131	
Number of MSME units, lakhs	2015-16	26.9	17.6	Uttar Pradesh	90.0	

Parameter	Year	Statistic for		Leading	
		Rajasthan	All-states	State	Statistic
Telephones per 100 population	2021	84.1	88.2	Delhi	282.0
Ease of Doing Business rank	2019	8	NA	Andhra Pradesh	1
Internet penetration, percentage of population	2019-20	35	45	Delhi	68

Source: Periodic Labour Force Survey (2018-19), Annual Bulletin on Additional Indicators of the Periodic Labour Force Survey (2019-20), NSS 75th Round, 22nd Issue of Women and Men in India of the Social Statistics Division at MOSPI, Economic Review 2020-21 of the Directorate of Economics and Statistics of Government of Rajasthan, Handbook of Statistics on Indian States of the RBI, National Family Health Survey-5

The discussion of the literature on contribution of ICAs to the economy, in the previous section, suggests that four of these parameters are of prime importance for developing a conducive environment for ICAs. These are: road connectivity, telephone and internet penetration, push to MSMEs and female labour force participation. Improving road connectivity is a general-purpose infrastructural improvement, which brings in a considerable agglomeration effect. In particular, it enables better access to marketplace for ICAs and people practising ICAs, and speeds up economic activity leading to an ‘economic trickle-down effect’ on the development of ICAs. Greater telephone and internet penetration amplifies this effect, by providing an additional mode of outreach and economic coordination, especially with the far-off stakeholders who were hitherto unconnected. The rationale for a focus on MSMEs is that they employ local resources (material as well as human resources), and thus, are efficiently positioned to market ICAs, which have a heterogenous spatial presence in the state of Rajasthan. Finally, promoting female labour force participation for market-led development of ICAs will allocate human resources to formal economic activities, which are otherwise engaged in household status production. Thus, it will do away with economic deadweights that may arise on account of redistributing existing labour from other economic activities into ICAs.

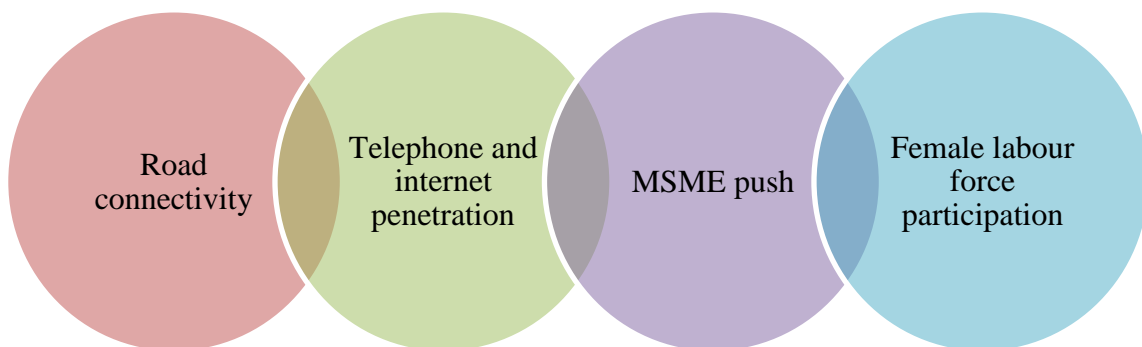


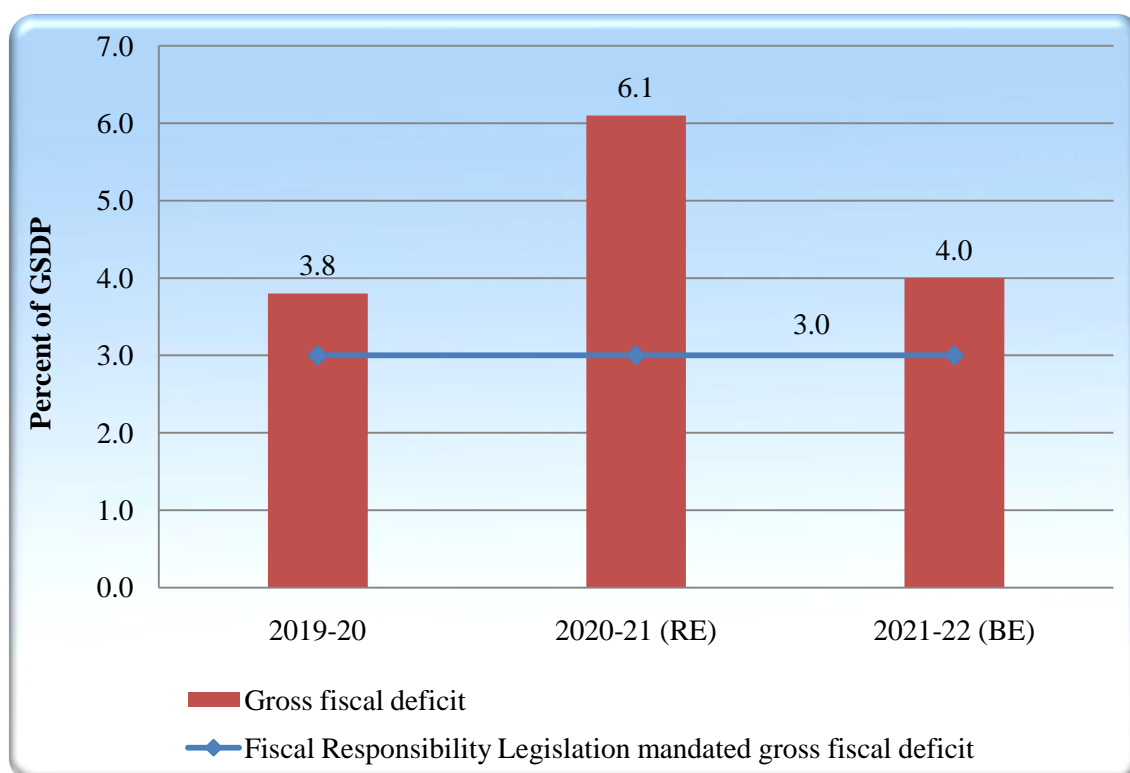
Figure 1.1: Key Attributes for Developing a Conducive Environment for ICAs

These four attributes, as inferred from the existing literature, provide a general direction for the state to promote ICAs. While we look at several other specificities of the ICAs in the state in subsequent chapters to devise an actionable strategy, it is important at the outset to take a closer look at state finances. State finances form the most important and fungible resource pool to undertake such promotional activities.

State Finances

Rajasthan's gross fiscal deficit (GFD) stands at 3.8 percent of GSDP (Figure 1.2) for the year 2019-20. For the next two fiscal years, it is likely to be at 6.1 and 4 percent, respectively. The state has to maintain its gross fiscal deficit (GFD) below 3 percent of its GSDP, as per the Fiscal Responsibility Legislation.

In forthcoming years, the Centre is likely to cut expenditure sharply, which will bring about a deceleration in the growth of primary expenditure of the state government. However, until the effect of the pandemic completely subsides, the state budget estimates are likely to reveal robust expenditure. In such a scenario, it becomes important to take a closer look at the composition of the state's spending. Enhancing social protection, improving human capital (healthcare and education), and building physical infrastructure are likely to remain of critical importance (RBI, 2021). This implies that direct allocation towards ICAs may remain stagnant or fall in the short term.



Note: RE is revised estimate. BE is budget estimate. Source: RBI (2021) Annual Report on State Finances

Figure 1.2: Rajasthan's Gross Fiscal Deficit

Therefore, the most plausible short-term instruments for the state's role in promoting ICAs are likely to be a conducive rules and regulations environment, and other non-fiscal incentives such as technical and advisory support. Only after the state finances are back to the normal trajectory (i.e., GFD below the 3 percent threshold) a significant fiscal pool may be allocated for ICA promotion.

With this backdrop, in the subsequent chapters, we take a closer look at several economic dimensions of ICAs such as consumption and wealth creation, market linkages, employment and investment, and export potential. The discussion intends to offer a nuanced assessment of the roles of all stakeholders and activities related to ICAs in the state. Subsequently, we take a micro-view of the rules and policy landscape for ICAs in the state. We begin by delving into the heterogeneous ICAs in Rajasthan through their spatial depiction.

2. IDENTIFICATION AND SPATIAL DISTRIBUTION

Intangible cultural assets (ICAs) are an integral part of the Rajasthan economy. A major difficulty in their assessment is on account of inseparability of ICAs from tangible cultural assets (TCAs) in several cases. Handicrafts and souvenirs within a festive event present one such case. In this chapter, we address this aspect by first making an exhaustive list of cultural assets in the state. Subsequently, we assign intangibility weights to elements and sub-elements of these cultural assets.

This chapter also discusses the spatial distribution of ICAs in Rajasthan. These are spread across several cultural zones of the state, suggesting a rich regional diversity in culture. For instance, the Shekhawati region, known as the “Open Art Gallery of India” is lined with Havelis that display remnants of arish and fresco work. In addition, the region is home to generations of Bandhej artisans. In contrast, Barmer in Western Rajasthan is home to the Manganiyar and Langa artist communities, also known as the “Desert Musicians”. The state observes celebrations of multiple festivals throughout the year across districts. These include the Bundi Kajari Teej Festival held in August every year, and the Pushkar Camel Fair taking place in November in the Ajmer district, among others. These differences in the spatial distribution of ICAs can be attributed to ancestry together with factors like diverse regional histories, and geographical variations.

Intangibility Weight for ICAs

We follow UNESCO's definition of ICA, as discussed in Chapter 1, for parsimony and general applicability of the current framework. Essentially, we identify nine elements of ICAs, each of which is further divided into several sub-elements. Figure 2.1 presents the ICA elements. A detailed list of sub-elements is in Annexure A.

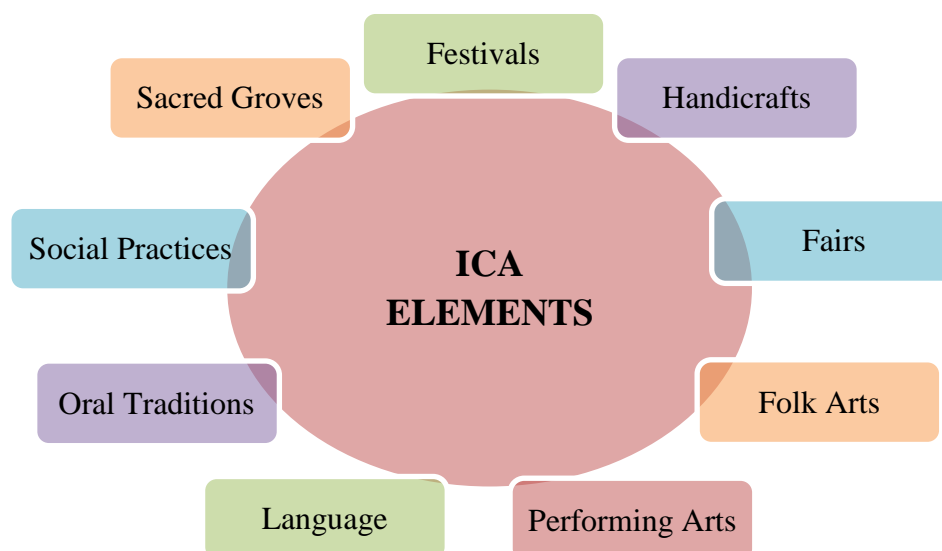


Figure 2.1: ICA Elements

It is possible for several ICA elements to amalgamate tangible elements, especially in their economic attribution. For example, within a festival, an art performance is an intangible cultural asset while a handicraft product on sale is tangible. In order to address this challenge, we devise a four-tier weight-mechanism for the extent of intangibility for each ICA element and/or sub-element (Figure 2.2). These are completely tangible (or negligibly intangible) having a weight zero; partially intangible having a weight 0.33, majorly intangible having a weight 0.67, and completely intangible having a weight one. We dwell on pertinent information from secondary literature, on-ground surveys, and stakeholder consultations to associate each of the ICA elements and/or sub-elements into one of these four categories.

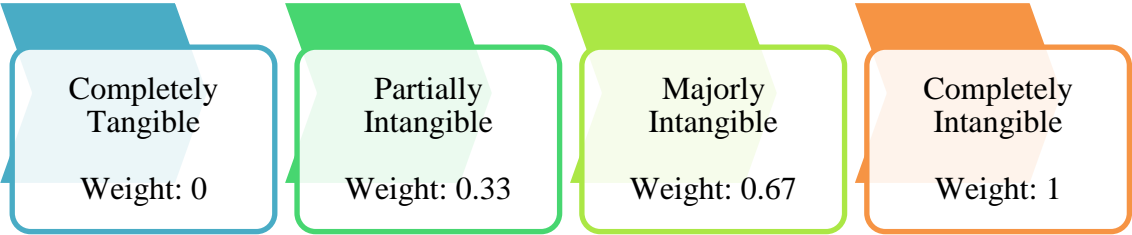


Figure 2.2: Groups based on Extent of Intangibility

Figure 2.3 presents the extent of intangibility for each of the nine ICA elements, computed by averaging across respective sub-elements. Annexure A presents the intangibility weights for each sub-element. The figure suggests lowest intangibility for handicrafts (at 0.33), followed by fairs (at 0.63). Intangibility for the remainder of the ICA elements is in excess of 0.9. At the outset, based on the discussion of existing literature (Chapter 1), an amalgamation of ICAs with TCAs increases their marketability. Therefore, it is likely that handicrafts and fairs have more significant market penetration than the other ICA elements.

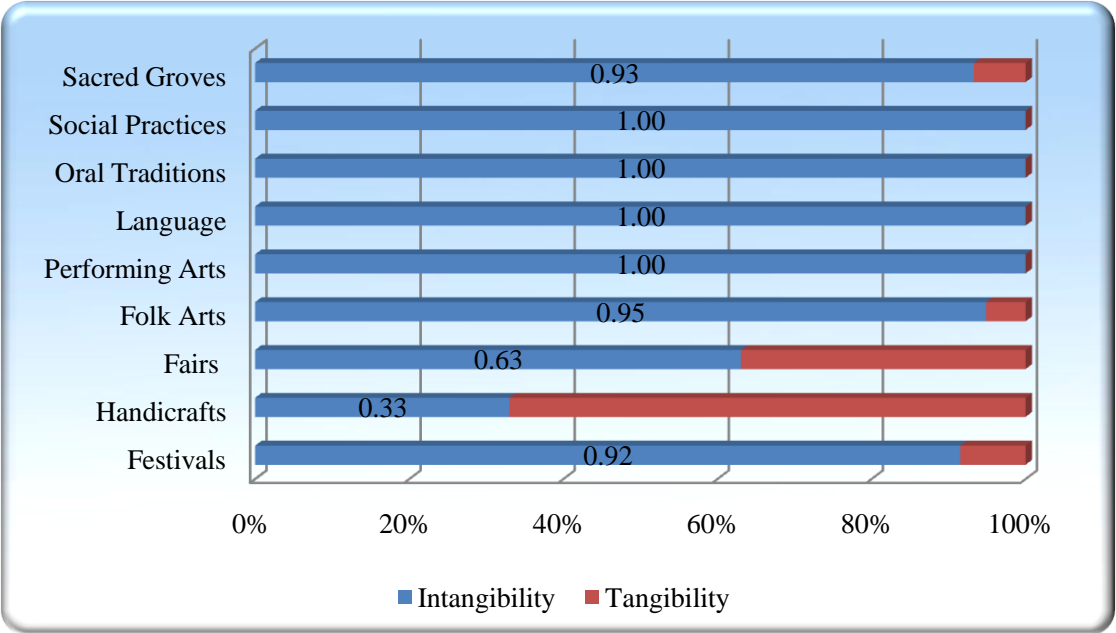
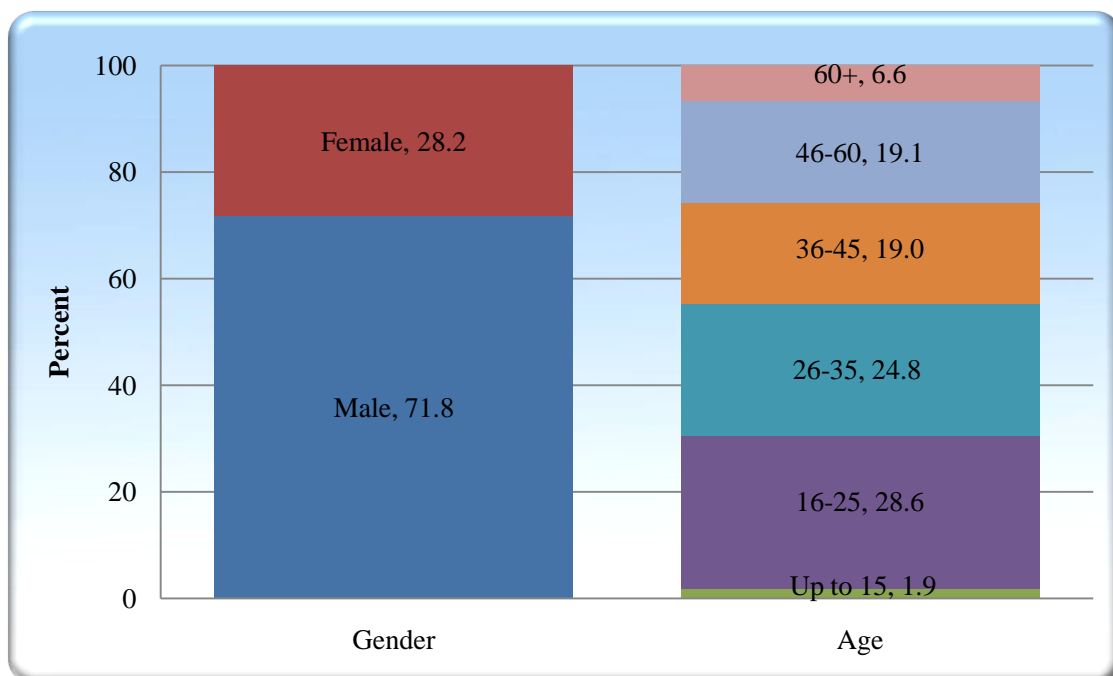


Figure 2.3: Extent of Intangibility for ICA Elements

Note: The extent of intangibility for each ICA element is computed by taking the simple average (mean) of intangibility across respective sub-elements. Annexure A presents the intangibility weights for each sub-element

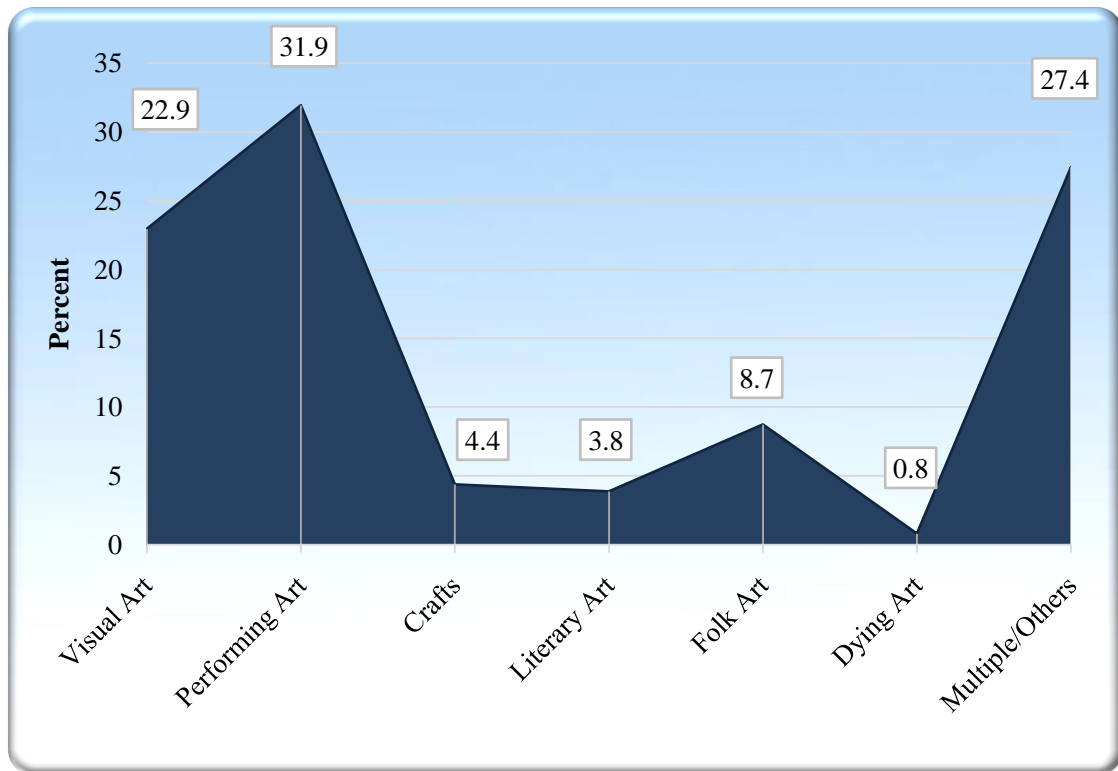
Participation in ICAs

Figure 2.4 presents the gender- and age-wise distribution of artists practising different forms of ICA activities in the state. The data for this assessment is taken from two rounds of surveys conducted by the Jawahar Kala Kendra (JKK) during 2020-2021, comprising approximately 4000 respondents. The JKK is a multi-art organisation located in Jaipur and set up by the Government of Rajasthan. The figure suggests that males account for over two-thirds of the participation into ICAs, which is lower than the overall gender participation pattern into different economic activities in the state (see Table 1.3, Chapter 1). As for age-wise distribution, the majority belong to the 16-25 age-group, followed by 26-35. These two groups together account for about 53 percent of the total number of artists. Overall, two important insights emerge from the figure. First, there is considerable potential for increasing female engagement into ICAs, especially into those that are local in scope, as women are noted to have low extra-local mobility. Second, the decreasing participation over age-groups (post 15 years of age) suggests that some artists exit at each subsequent group. Policies may be directed towards improving incentives for practitioners to remain engaged in ICAs.



Source: Jawahar Kala Kendra (2020-21)

Figure 2.4: Gender- and Age-wise Distribution of Artists



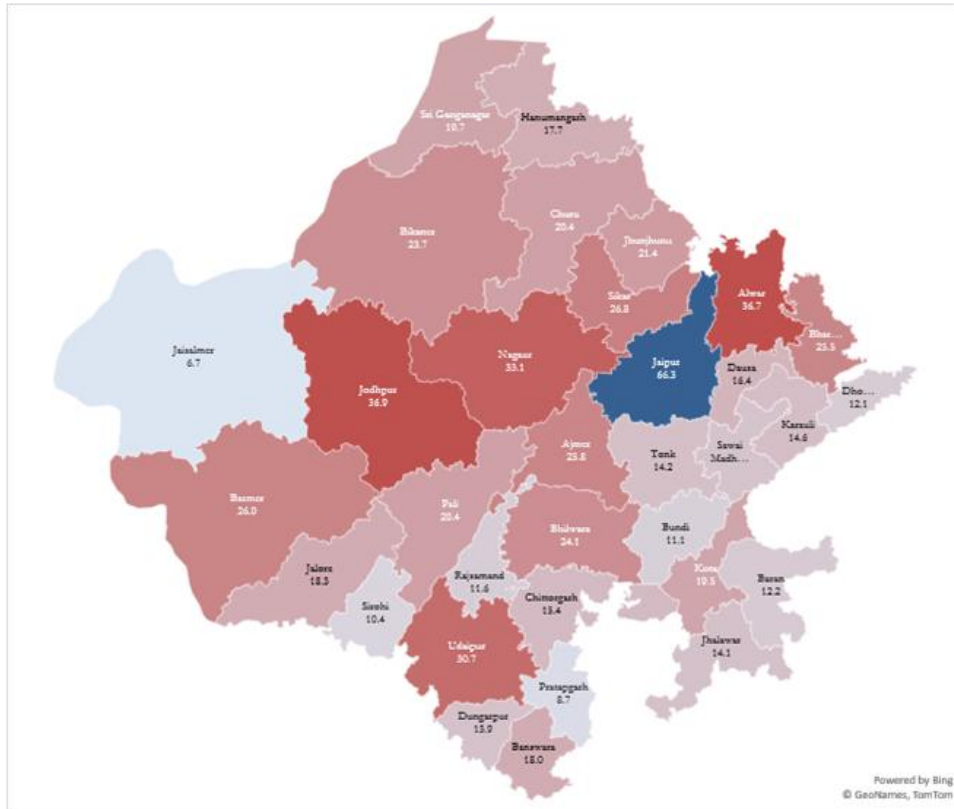
Source: Jawahar Kala Kendra (2020-21)

Figure 2.5: Distribution of Artists by Art-type

Figure 2.5 presents the distribution of artists by art-type. Considerable disparity exists in participation in different forms. Performing and visual arts occupy the leading position, along with those who practice multiple art forms. Dying and literary arts occupy the bottom position in participation. It is important for public policy to have a more dedicated focus on preservation and protection of those art forms that have lower participation.

Spatial Distribution – Cultural Regions of Rajasthan

To situate the discussion on spatial distribution of ICAs in Rajasthan, we present a district-and population-wise map of the state in Figure 2.6. These districts are clubbed under several regions, based on their cultural landscape in the state (Figure 2.7). We discuss the salient features of these regions below.



Source: Census 2011

Figure 2.6: Rajasthan Districts and Population

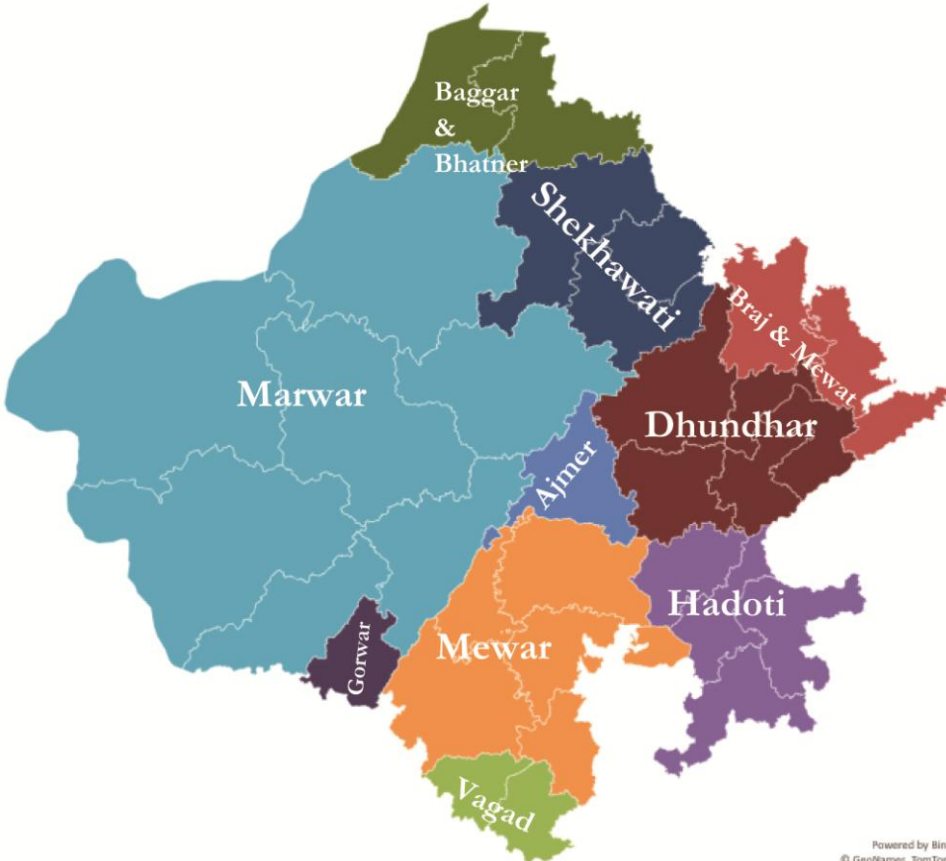


Figure 2.7: Cultural Regions of Rajasthan

Marwar region

The Marwar region forms the western part of Rajasthan, and includes cities like Jaisalmer, Jodhpur, Bikaner, Sirohi, Jalore, and Barmer. This cultural zone practises a range of traditional handicrafts such as carpet weaving, hand block painting and sandalwood work. Historically home to Rajput clans, the region is rich in oral traditions, which include various tales and oral testimonies of Rajput valour. In addition, the cultural riches of the Marwar region include dance forms like Bhavani, drum, Kurjan, and a multitude of traditional handicrafts like carpet weaving, perfumes, and embroidery. The groves present in this region range from Orans to the Vanis, which are considered sacred by the locals for their natural vegetation.

Barnawa Jageer, Barmer	Patodi, Barmer	Chopasani, Jodhpur	Jaisalmer	Pokhran
•Langa musicians	•Jutti making •Kasidakari embroidery	•Kalbelia musicians and dancers	•Puppeteers	•Pottery
Napasar	Sheo, Barmer	Phalodi, Jodhpur	Jharna and Barna, Jaisalmer	
•Weaving	•Manganiyar musicians	•Langa musicians	•Manganiyar and Meghwal musicians	

Figure 2.8: Clusters in the Marwar Region

Within the Marwar region, there exists considerable inter-generational and intra-regional diversity, making this region a collection of cultural hubs/clusters of traditional art forms. Some of these are presented in Figure 2.8.

Mewar region

The Mewar region lies to the southeast of Marwar. Major cities in this region are Chittorgarh, Udaipur, Bhilwara, and Dungarpur. The region was home to the famous Sisodia Rajputs, and its cultural evolution closely interlinks with Rajputana history. For example, tales of valour, like the Jauhar of Queen Padmini and the battle between Akbar and Maharana Pratap, are carried through inter-generationally. They impart a heightened sense of cultural identity to people in this region.

Fairs	Folk-dance	Handicrafts	Sacred Groves	Linguistics- Oral traditions
Kumbhalgarh Fair Nagaur Fair	Ghoomar Kalbelia Bhavai Terah-Tali	Stone carvings Idol making	Sacred Vani Groves	Mewari Marwari Bhili Bangria

Figure 2.9: Major ICAs in the Mewar Region

The Mewar region has a diverse set of ICAs present. Figure 2.9 lists some of these. In addition, the region marks a considerable effort by the local institutions, communities, and the Government of Rajasthan towards clusterization of artist communities. For instance, Shilpgram, located near Udaipur, organises a fair-festival as a platform for local artists and artisans to display their art-forms to tourists from around the world. Funded by the West Zone Cultural Centre, it provides an opportunity to enhance and aid the talent and skills of craftsmen in Rajasthan and other states in India.

Ajmer and Hadoti region

The Hadoti region, to the east of Mewar, is endowed with several archaeological masterpieces situated in and around cities like Bundi, Kota, Baran and Jhalawar. With the international reach of the textiles, about half the state’s handloom population are employed in the sector. Kota doria is a large income source for the region (World Bank, 2018). Due to the presence of the river Chambal, the area experiences a semi-arid climate and has numerous waterfalls, lakes, stepwells (baori) and tanks (johra). It is a primary center for migratory birds, which drive the cultural activity of bird-watching in the region.

Among the intangible cultural heritage of the region, varied forms of handicrafts hold prominence (Figure 2.10). Through state level efforts, the region observes linkages between artisans, design schools and institutions that facilitate promotion of the traditional heritage.

Fairs	Folk-dance	Handicrafts	Sacred Groves	Linguistics- Oral traditions
Kajari Teej Fair Chandarbagh Fair Bundi Holi	Chakri music Kalbelia Kachhi Ghodi Bindori	Lac Bangles Miniature paintings Kota Doria Leather work Ornamentation and embroidery Handmade Paper Block Printing Stone mining Marble work	Muketshwra Bani Liloj ki Doongri	Dhundhari Marwari Ajmeri Harauti Bundeli Malvi

Figure 2.10: Major ICAs in Ajmer and Hadoti Region

Gota makers	Ittar manufacturer	Phad painters	Bangle makers
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Figure 2.11: Artisan Clusters in Ajmer

Further to the north of Mewar lies Ajmer. Languages spoken in the region include Marwari, Dhundhari, Ajmeri, Bundeli, and Malvi. Ajmer district is one of the

most popular tourist attractions, mainly due to local fairs and global festivals. For example, annual festivals such as the International Sufi Festival and Pushkar mela attract tourists from around the world. The latter includes events which adorns camels with jewellery and organizes camel pagents. In addition, Pushkar is also known for leather work and culinary treats called ‘malpua’.

Ajmer hosts the Urs Fair which commemorates the death anniversary of revered Sufi saint Moinuddin Chishti. His dargah hosts qawwalis every evening, which reflect the cultural history of the region. The city is home to several artisan communities (Figure 2.11). While the cultural heritage of Ajmer and Pushkar attracts a steady flow of tourists from Jaipur, other regions such as Krishnagarh also benefit from being on the Jaipur-Ajmer route.

Dhundhar region

To the north and east of Ajmer lies the Dhundhar region. It includes the districts of Dausa, Tonk, Alwar and Jaipur. The region is endowed with forts. Also known as the Pink City, Jaipur enjoys the highest tourist footfall in Rajasthan at all three levels - local, national, and international. The city is at the core of major tourist circuits like the Golden Circuit, which constitutes Delhi, Agra, and Jaipur. Aside from monuments and museums like Albert Hall and City Palace, Jaipur city is rich in seasonal fairs like the Elephant Festival, and a variety of painting and art forms. Through markets like Bapu Bazar and Johri Bazar, Jaipur exposes tourists to Rajasthani culture as a whole. The markets display cultural heritage in the form of safa tying and sale of products like jewellery, paintings, clothes, and handicrafts, curated by local artisans across the state (Figure 2.12). In addition, direct market linkage and online sale of handicrafts and handloom units aid in expansion of art-forms to a global level. Luxury experiences such as “The Palace on Wheels” are offered to tourists (its services are suspended because of the pandemic). Jaipur has a number of NGOs working in the sector of heritage management, such as the Jaipur Virasat Foundation, and organisations such as Jawahar Kala Kendra which promote the arts and crafts of the state.

Festivals	Handicrafts	Sacred Groves	Linguistics-Oral traditions
Jaipur Literature Festival Jobner Jwala Mata	Blue Pottery Kundan Work Sandalwood Work Amber style paintings Mandana art Lac bangles Handmade paper leather shoemaking Block printing	Hanuman ji ki Bani Agamath ki Bani	Dhundhari

Figure 2.12: Major ICAs in the Dhundhar Region

Overall, the residential mansions in Jaipur, Chomu, Sambhar, Alwar and Jobner form a rich asset base for the Dhundhar region. While some of the heritage properties have been converted to hotels, others in the areas of Sambhar and Jobner remain unused. This indicates considerable scope for development of the region through heritage management.

Braj and Mewat region

Braj and Mewat, on the eastern frontier of the state, are home to the famous folk tale of Hir and Ranjha, which continues to be recited by bards in the Mewat region of Rajasthan. Diverse folk culture in this region includes Mandana artworks, Sahanai Vadan, and Baithaki music among others.

The Braj region encompasses Sawai Madhopur, Karauli, Bharatpur and Dholpur districts. The region is endowed with natural heritage assets including the Bharatpur Bird Sanctuary and Ranthambore National Park, which attract a large number of tourists. In addition, there are several temples which display the skilled craftsmanship of artisans of the region. In terms of intangible cultural heritage, Sawai Madhopur plays a significant role. It is known for hand printing, embroidery, and patchwork. Along with Deeg, these two regions nurture craft industries entailing carpet weaving, textile work, and others (Figure 2.13). There are several industrial clusters and NGOs working in the regions to increase the employment scope of the industries (World Bank, 2018).

These two regions of Rajasthan, along with adjoining districts in the states of Uttar Pradesh and Haryana, also form a significant part of pilgrimage tourism.

Fairs	Handicrafts	Sacred Groves	Linguistics-Oral traditions
Braj Holi Phoolo ki Holi	Black Pottery Ironware Embroidery Hand printing Patch work Madana art Dhol Gayan Sahanai Vadan	Dev Bani Shamlat Deh	Mewati Dang

Figure 2.13: Major ICAs in Braj and Mewat Region

Shekhawati region

To the north of the Dhundhar region, Shekhawati is home to the cities of Jhunjhunu, Churu, Sikar and Mandawa. The region has a large number of residential mansions with remnants of fresco and arish work. While some heritage properties have been adapted into museums, art and culture centers, and hotels for commercial use, others are left uninhabited. This offers scope for efficient use of a large asset base. The region has a strong civil society base such as the Podar Foundation in Ramgarh and the

Monarka Foundation in Nawalgarh, among others. Through commercial tools such as adaptive reuse of hotels, homestays, museums, and galleries, these bodies actively work on heritage management, urban renewal, and cultural dissemination (World Bank, 2018). In addition to heritage properties, the region is endowed with varied art forms and festivals such as the Shekhawati Utsav which attracts both national and international tourists (Figure 2.14).

Fairs	Folk-dance	Handicrafts	Sacred Groves	Linguistics- Oral traditions
Shekhawati Utsav Holi	Geendad/Gair Kachhi Ghodi Dance	Fresco Bandhej Lac bangles Hand Block Printing Tie and Dye Leather footwork Arish	Baleswar Oran Ganeshwar Oran	Marwari Shekhawati Haryanvi

Figure 2.14: Major ICAs in Shekhawati Region

Baggar and Bhatner regions

At the northern frontier of Rajasthan lie the Baggar and Bhatner regions. They are home to Hanumangarh and Ganganagar. The region is endowed with archeological masterpieces and temples which showcase fine craftsmanship. This, in turn, fosters pilgrimage tourism in the region. Major ICA attractions in this region include diverse fairs and folk-dance forms, and handicrafts involving lac bangles and leather work (Figure 2.15).

Fairs	Folk-dance	Handicrafts	Archaeological Sites	Linguistics- Oral traditions
Bhatner Ashwa Gogamedi Bhadrakali Pallu Shila Mata Shaheed Bhai Sukha Singh ji and Bhai Mahtab Singh ji Yodagari	Chang Kachhi Ghodi Dance	Lac Bangles Leather Footwear	Kalibangan Badopal Bhadrakalo Dhokal Bhatner fort Manak Munda PeerSultan Pilibagan Baror Binjor	Bagri Malvayi Haryanvi Sidhi Sansi Sikh Bawari

Figure 2.15: Major ICAs in Baggar and Bhatner Region

Regional Diversity of ICAs in Rajasthan

All regions of Rajasthan are culturally rich, though the ICA elements are different across regions. This prompts a deep-dive into assessing ICA diversity across regions. This is especially important from a policy standpoint, as preserving and promoting cultural diversity is of paramount interest. Cultural diversity does not imply the precedence of an ICA element or a region over another, rather it suggests how people in different regions connect with the culture. Put differently, it suggests the variety of ICAs that people practise, on a regional aggregate, in the state.

In order to assess this diversity in ICAs in Rajasthan, we map each region of the state with the number of different forms (diversity) of an ICA element. The mapping is based on observation from on-ground surveys, stakeholder consultations and a review of a large pool of secondary literature. The mapping does not account for population size or the size of the economy. But, to the extent that state cultural policies target a region, it suggests a way to look at the innate heterogeneity in that region.²

We map the regions on a scale of 10 to 100, with 100 representing the most diverse outlook for a given ICA element. We have clubbed the Marwar and Gorwar regions, Ajmer and Hadoti regions, Mewar and Vagad regions, and fairs and festivals for this purpose, as they demonstrate a similar outlook. Figure 2.16 presents graphical representations for all ICA elements, obtained by aggregating these. Figures 2.17-2.23 present graphical representations for each ICA element. These figures suggest that the Marwar and Gorwar regions together reveal the maximum diversity in ICAs, followed by the Ajmer and Hadoti regions, and the Mewar and Vagad regions.

² The map based on our reading of the literature and responses from the stakeholders. Therefore, it may not be exhaustive. Future endeavour may take the current mapping as the base for further investigations.

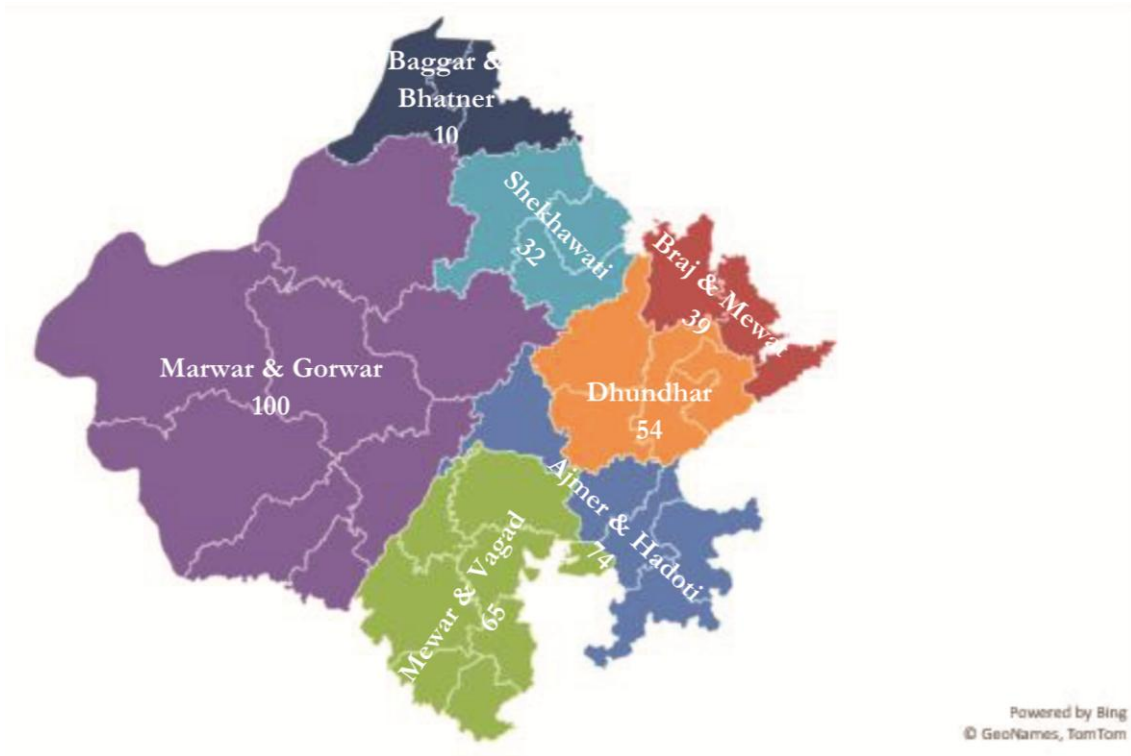


Figure 2.16: Regional Diversity of All ICA Elements

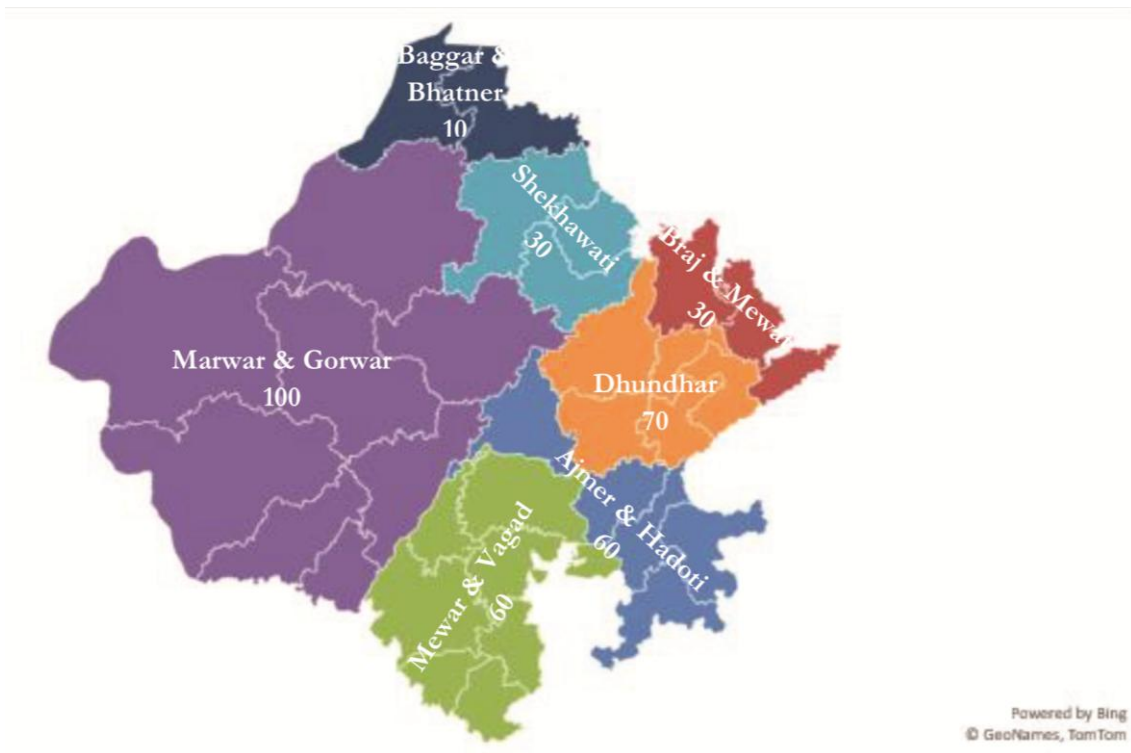


Figure 2.17: Regional Diversity of Sacred Grooves

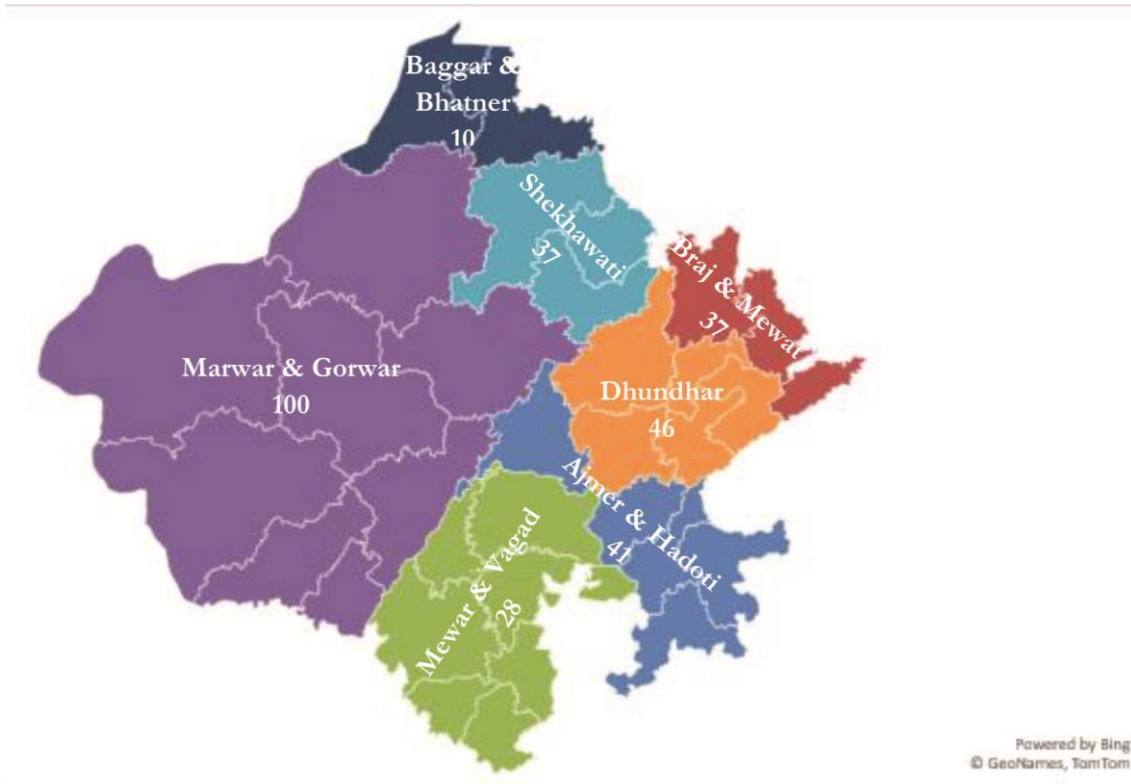


Figure 2.18: Regional Diversity of Handicrafts

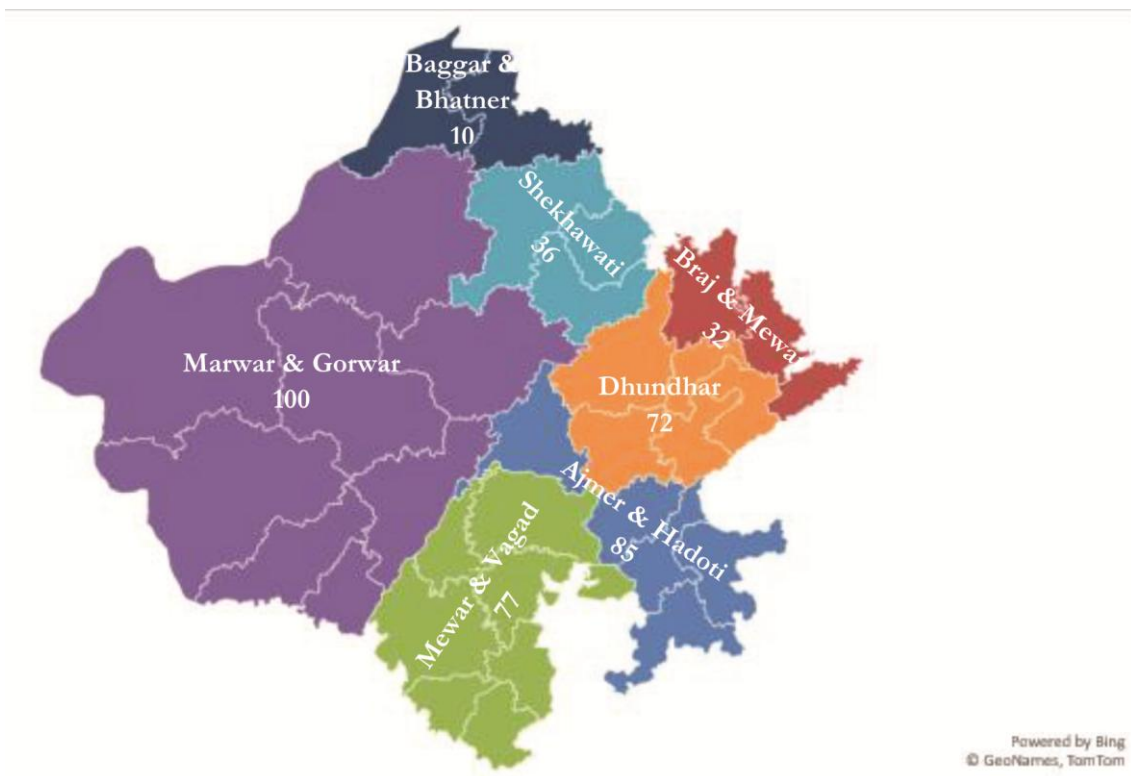


Figure 2.19: Regional Diversity of Fairs and Festivals

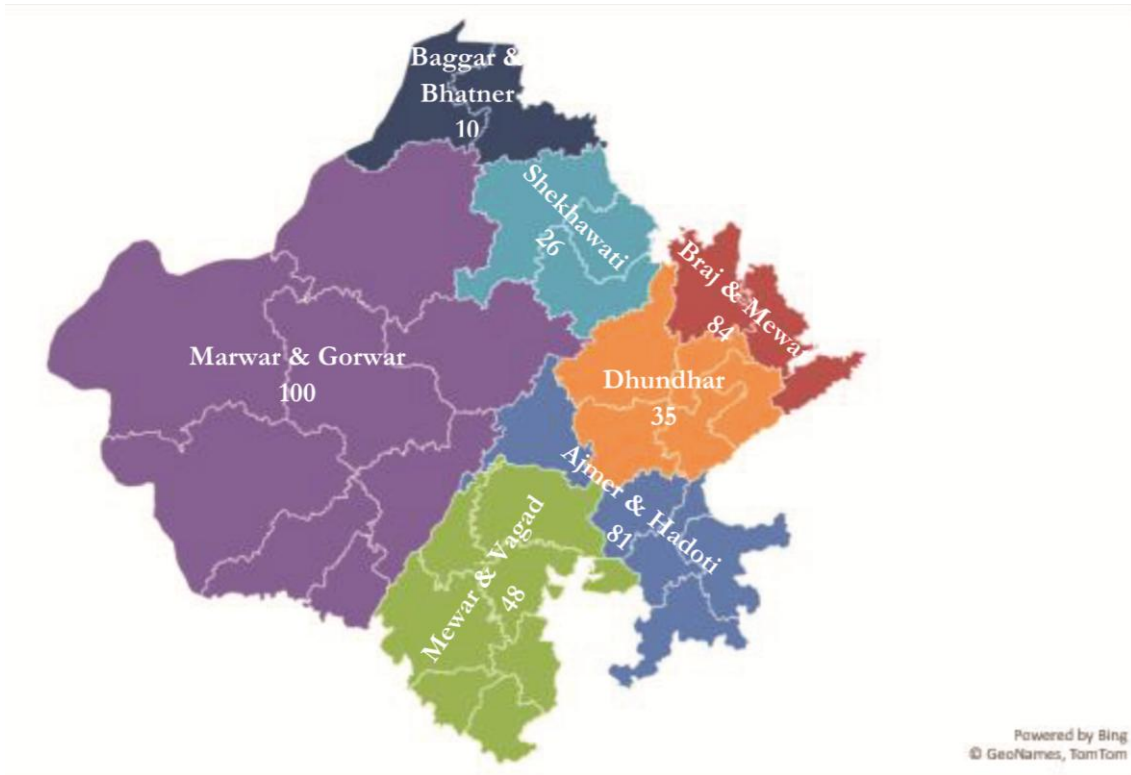


Figure 2.20: Regional Diversity of Folk Arts

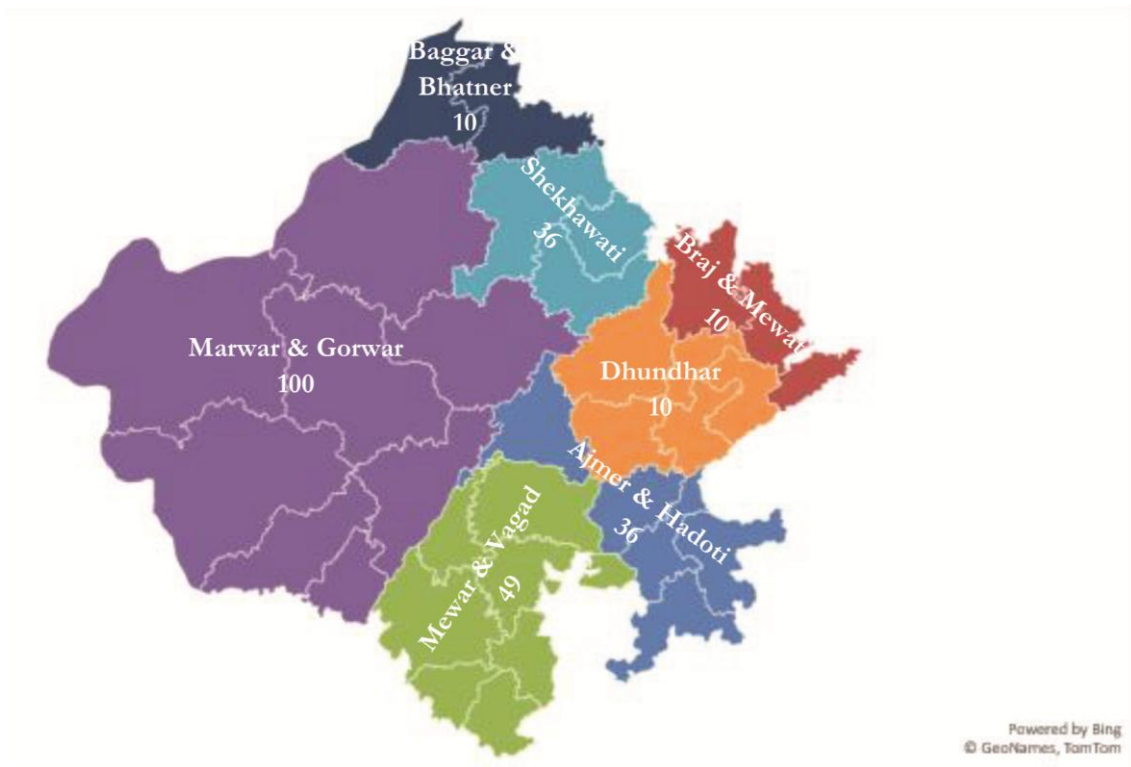


Figure 2.21: Regional Diversity of Performing Arts

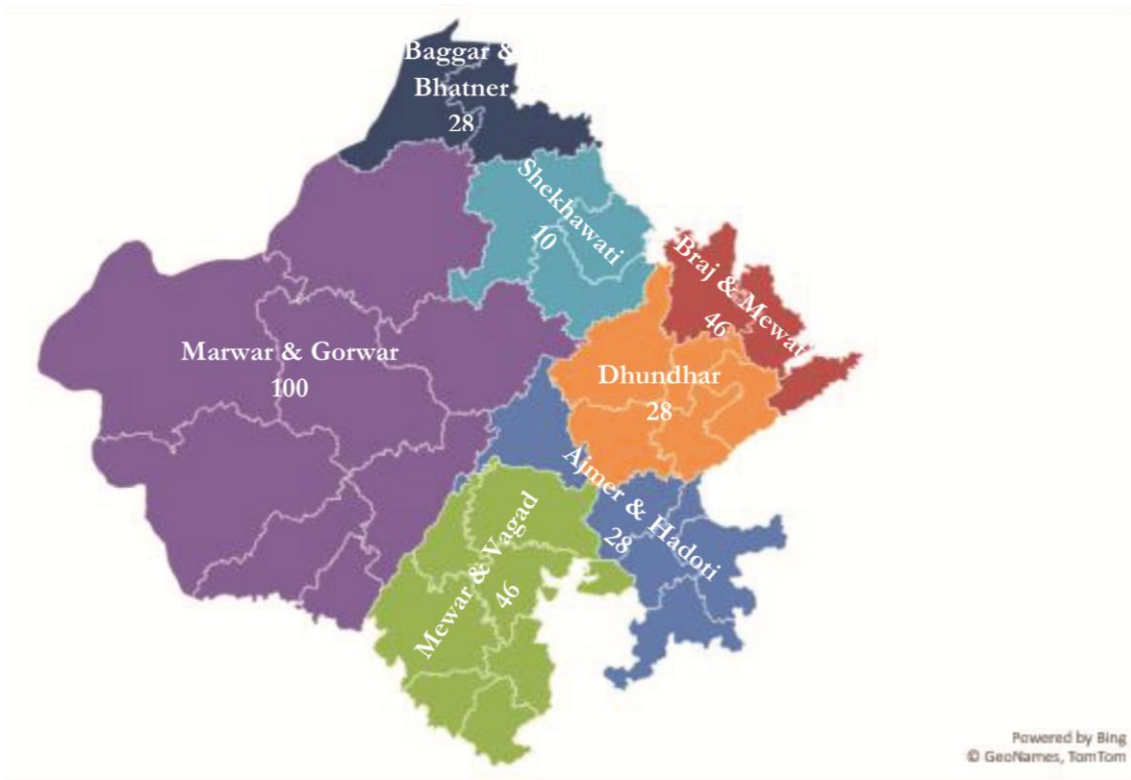


Figure 2.22: Regional Diversity of Oral Traditions

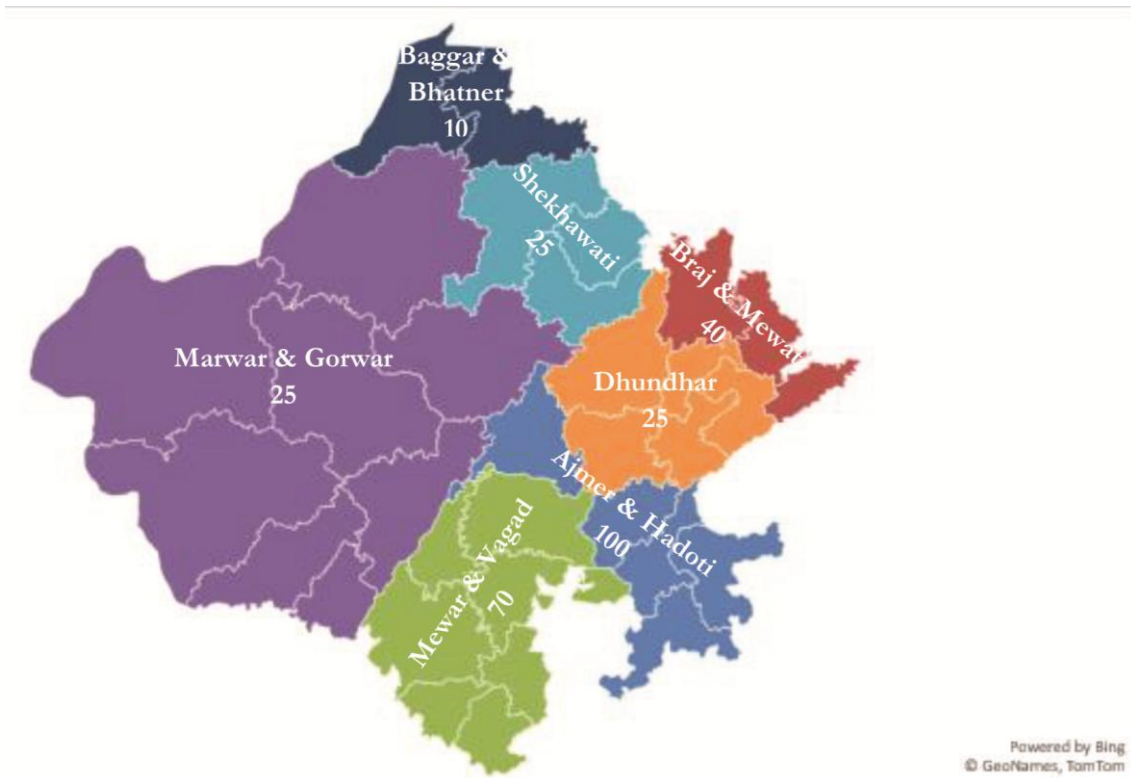


Figure 2.23: Regional Diversity of Languages

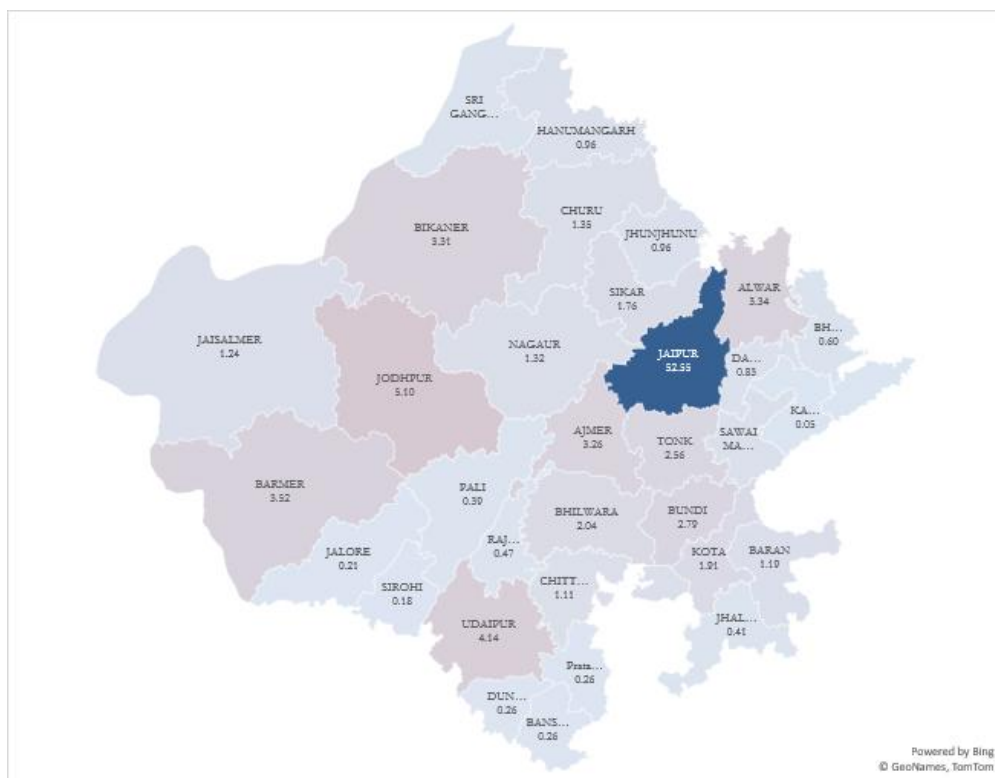
Participation in Art Forms, ICA Diversity, and Population Density

In order to deep-dive into the spatial distribution of ICAs, we assess the associations between participation in art forms, ICA diversity, and population density. Population density is an important metric as it coherently sums up the performance of locations in terms of amenities, growth, infrastructure, human capital, etc. Thus, it is an important facet in understanding the interrelationships between ICAs and the market.

In deriving this association, our main interest is to assess the position of each region on a given parameter vis-à-vis these parameters, rather than a point estimate (i.e., coefficient of association/correlation) for overall fit of the data. This becomes even more important as, from a policy standpoint, the positioning of regions on different parameters is relevant for invoking actionable decisions.

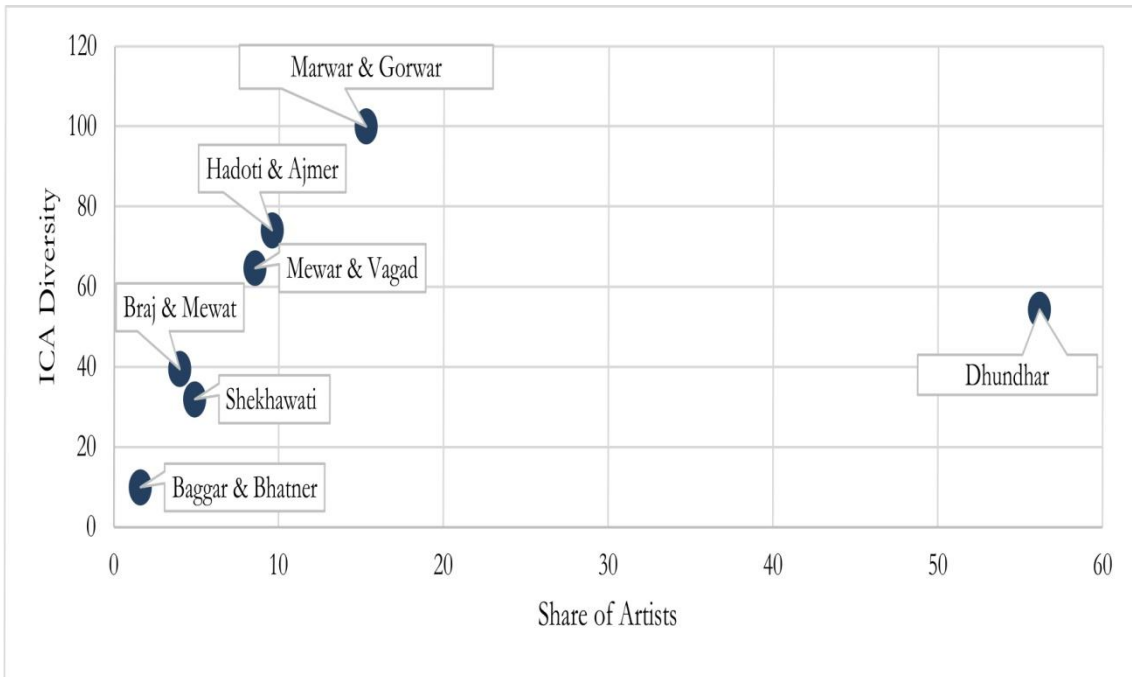
Participation in Art Forms and its Association between ICA diversity

Figure 2.24 presents a district-wise distribution of participation into ICAs. Jaipur stands out as the performance destination, as being the capital city, it attracts the greatest number of eyeballs and has the most developed market for showcasing ICAs. Among other districts, Jodhpur, Udaipur, Barmer, Bikaner, Alwar and Ajmer are also popular locations for art performances. We further assess if this spatial distribution of performing artists is correlated with ICA diversity. Figure 2.25 presents a scatterplot for the association between participation in art forms and ICA diversity, at the regional level. We notice this association to be positive and strong.



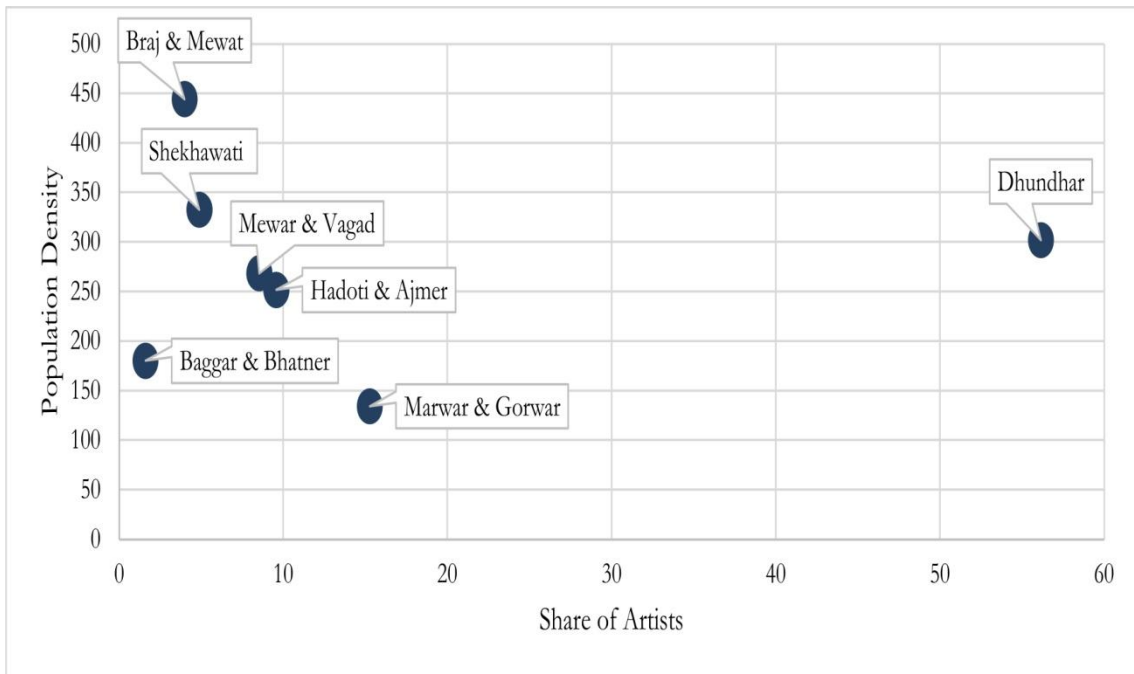
Source: Jawahar Kala Kendra (2020-21)

Figure 2.24: Spatial Distribution of Participation into Art Forms



Source: Jawahar Kala Kendra (2020-21), Census (2011), On-ground Survey, Stakeholder consultations

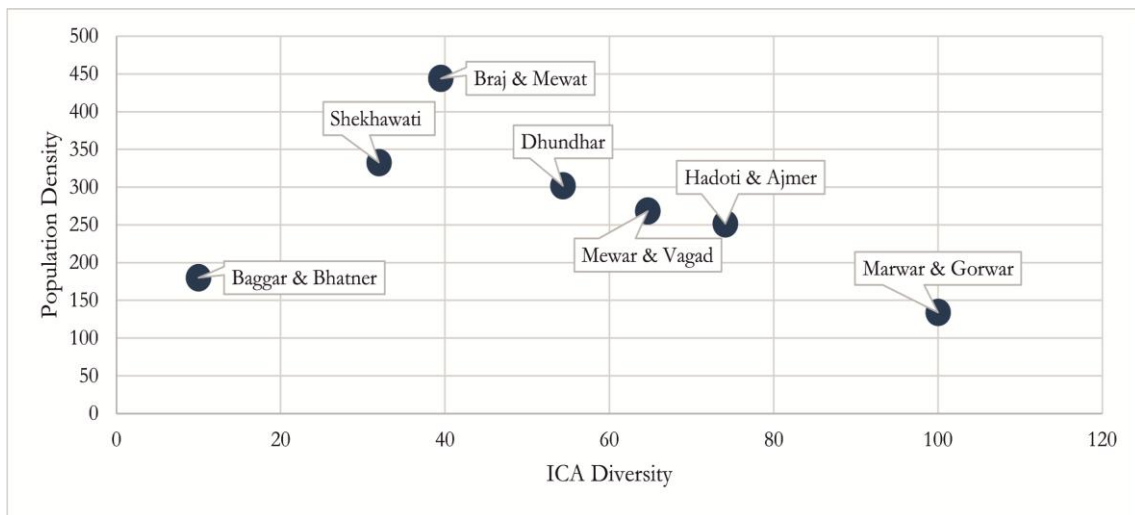
Figure 2.25: Participation into Art Forms and ICA Diversity



Source: Jawahar Kala Kendra (2020-21), Census (2011)

Figure 2.26: Participation into Art Forms and Population Density

Interestingly, barring Jaipur, we note a negative association between participation into ICAs and population density (Figure 2.26); and between ICA diversity and population density (Figure 2.27). Two possible explanations emerge. First, Jaipur is a sufficient ICA marketplace for the entire state. Artists and diversity in art forms in other regions, thus, are more associated with traditions (or a less marketed setup) than the market. Second, given Jaipur is by far the most notable marketplace, the return on diversity and participation in other areas is likely to be low. Additionally, to the extent that artists have to transit to Jaipur for better compensation, there would be high competition among them - leading to elite capture (more reputed artists getting disproportionately more chances to perform than the less reputed ones). Our on-ground assessment suggests both explanations to be valid.



Source: Census (2011), On-ground Survey, Stakeholder consultations

Figure 2.27: ICA Diversity and Population Density

Policy Lever

This spatial-diversity mapping has two-fold implications for state-level cultural policies.

1. Finding a common minimum program would be more difficult in more diverse regions. However, they represent the most critical regions for the preservation and promotion of ICAs. Therefore, community participation in such policy shaping and implementation is a must. To enable this, the government should encourage community-led endeavours through fiscal (e.g., tax holidays or subsidies) and non-fiscal (e.g., one window clearance, easy licensing) means, and through technical support in integrating ICAs with the market.
2. Given the overall diversity in ICA elements and participation, both across and within regions, policy programs that promote competitive cooperation between the practitioners, rather than piecemeal programs, would help the preservation and promotion of ICAs the most. These will not only mainstream the different forms of ICAs but also enable an environment for community support. Besides, competitive cooperation is likely to pave the way for the fusion of ICAs (where there is sufficient scope to do so), which is noted to have greater influence on both, marketability and sustainability, going forward.

3. EXTENT OF CONSUMPTION

Rajasthan is among the top ten tourist destinations in India (Dayal and Yadav, 2019). The top tourist destinations in the state include Jaipur, Jodhpur, Jaisalmer, and the pilgrim centers of Ajmer, Nathdwara and Pushkar (Dept. of Tourism, GoI, 2020). Over the years, driven by concerted societal and government efforts, locations around these tourist circuits have also witnessed an increase in national and international tourists. Tourism, as a showcasing artifact of the state's rich and diverse cultural heritage, has further enhanced its capacity for cultural development and promotion. Thus, through both a direct and a feedback effect, tourism is the most suitable and viable metric for assessing the extent of ICA consumption in the state.

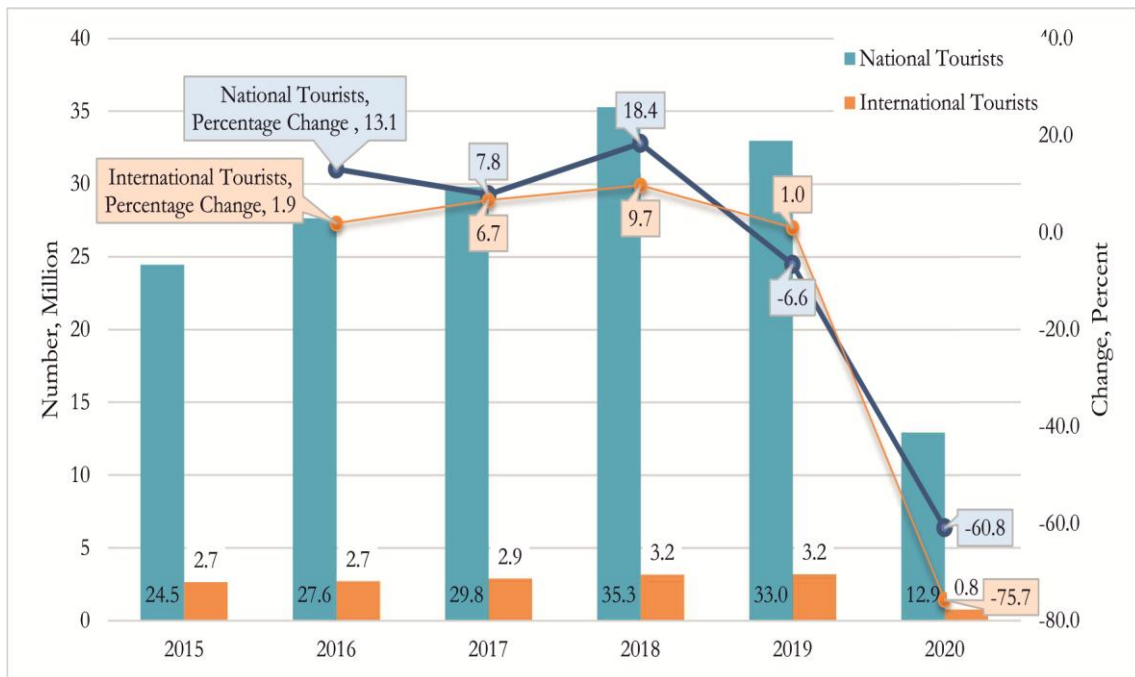
Sustained ICA consumption – as measured through evolving patterns of tourism – is driven by the inter-generational flow of skills, participations, promotions, and conducive policies. In particular, the inter-generational flow of skills makes the backbone of this ICA ecosystem, while the efforts of the other players and policies make the superstructure of this ecosystem. This makes it important to assess how ICAs have helped artists and artisans, practising local cultural forms, in wealth creation. This assessment will serve a two-fold purpose. First, it will reflect on the incentives for these practitioners to remain inter-generationally involved in these ICAs. Second, it will offer a policy direction to the government on the material welfare of the practitioners, paving the way for protection and promotion of ICAs.

Tourism Landscape

During 2015-19, before the onset of the pandemic, there was a steady flow of tourists to Rajasthan (Figure 3.1). In this period, national tourists account for the bulk, at approximately 91 percent, and international tourists account for the remaining. On an average, national tourist footfall grew by 8.2 percent, while international tourist footfall grew by 4.8 percent. The pandemic and resulting lockdown led to a considerable dip in both kinds of tourist footfalls, by over 60 percent and 75 percent respectively.

The 2015-19 period marks several government initiatives towards marketing and promotional activities for the cultural heritage of Rajasthan, fuelling the high growth of both national and international tourist arrivals. Some of the international initiatives include the International French Travel Market in Paris, ITB Asia (Singapore) and Berlin, World Tourism Mart in London, and the International Tourism Trade Fair (FITUR) in Spain (Yadav and Yadav, 2021). These initiatives showcased various forms of Rajasthani culture such as pilgrimage, adventure, indigenous arts and crafts, which cater to the varied preferences of visitors. Besides, the state's participation in these inter-country programs offered a network platform for multiplying the feel of Rajasthani culture to the rest of the world. In fact, even in the pandemic-affected year of 2020, Rajasthan hosted nearly eight lakh foreign tourists, who constituted about 6.2 percent of the total number of foreign tourists to India.

For national tourists, over a long time, Rajasthan has been a leading destination in the country. During 2011-2019, the number of national tourists to the state grew by roughly 53 percent (Rajasthan Dept. of Tourism, 2020). Major attractions for national tourists include a diverse display of natural resources, rare wildlife, architectural masterpieces, destination events, pilgrimage and heritage sites. Chapter 2 presents a detailed discussion of these attractions through a spatial depiction of the state’s ICA forms.



Source: Tourism Department, Government of Rajasthan

Figure 3.1: Tourist Footfall Trends in Rajasthan

Extent of Consumption due to ICAs

We use information on tourist footfall for 2019, the last year before the pandemic disruption, to assess the extent of ICA consumption across 33 districts of Rajasthan. A key challenge in this assessment is on account of limited data availability. That is, tourist footfall data is available only for 18 districts of the state. For the remaining 15 districts, we estimate tourist footfall using the approximation in Table 3.1.

Table 3.1: Approximating District-wise Tourist Footfall

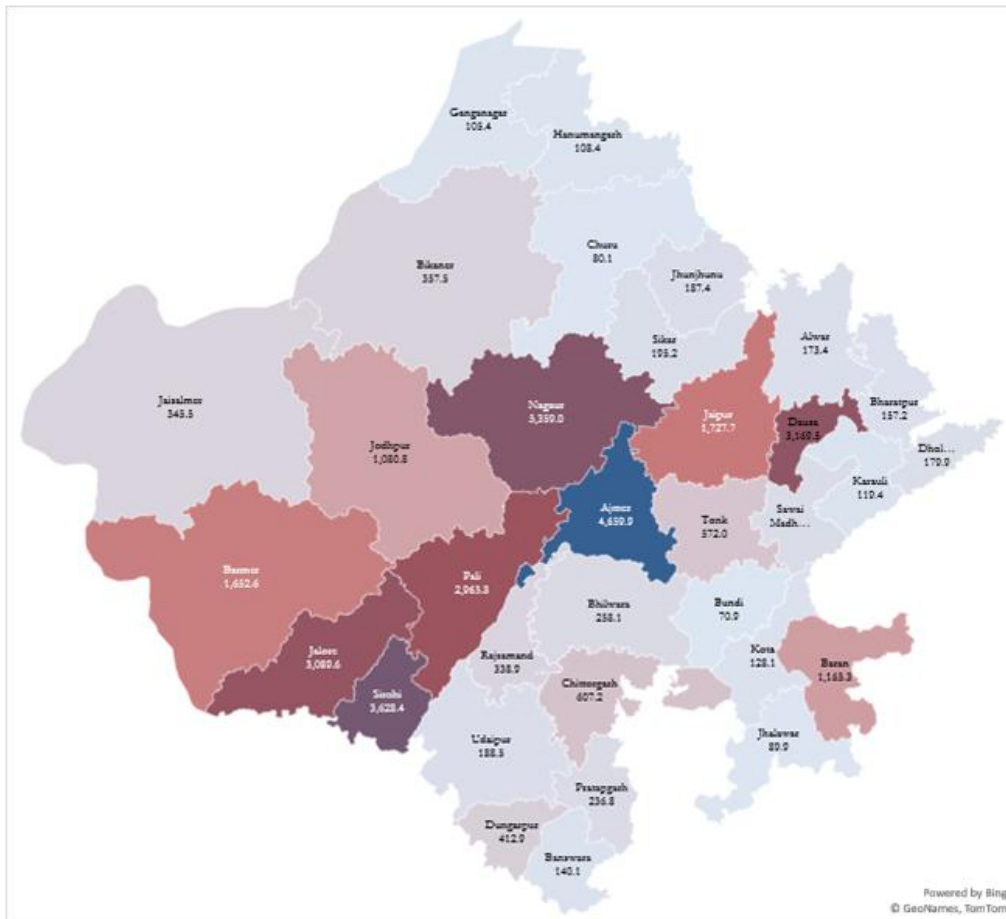
1.	Sort the 18 districts for which tourist footfall data is available and the 15 districts for which tourist footfall data is unavailable into cultural regions (cultural regions are listed in the previous chapter)
2.	For a region that has available tourist footfall data for some of the districts, approximate tourist footfall for a district for which this information is unavailable using the following formula: $\text{Tourist footfall in the region } X \frac{\text{Population density of the district}}{\text{Population density of the region}}$

3. For a region that does not have footfall data for any district, tourist footfall for each of its districts using the following formula:

$$\text{Tourist footfall in the proximate region } X \frac{\text{Population density of the district}}{\text{Population density of the proximate region}}$$

Proximate region is identified on the basis of aggregate ICA diversity score, discussed in Chapter 2

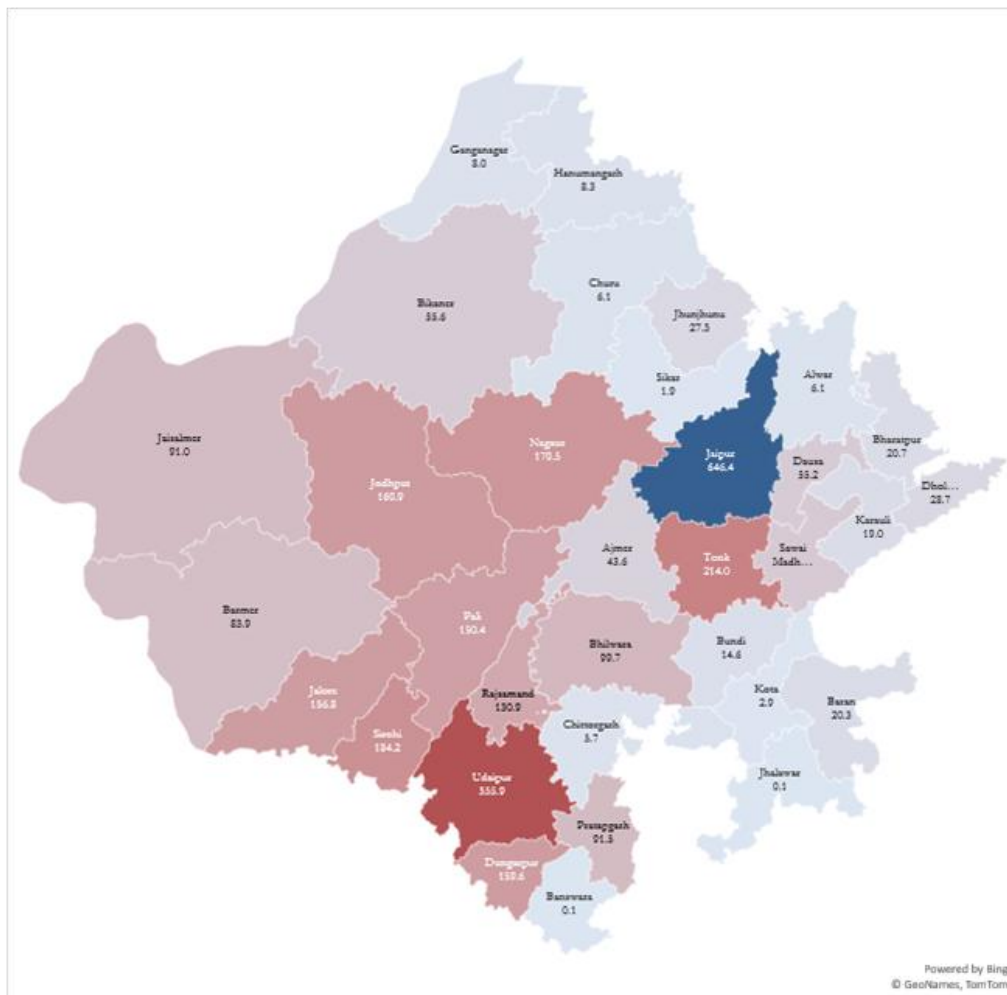
For all the cultural regions, except the Baggar and Bhatner region, data is available for at least some of the districts. Therefore, we use step 2 from Table 3.1 in approximating district-wise missing data for districts in these regions. For the Baggar and Bhatner region, which constitute Ganganagar and Hanumangarh districts, we do not have data on any of the two districts. Therefore, we use step 3 from Table 3.1 in approximating district-wise missing data for this region. The proximate region for the Baggar and Bhatner region is the Shekhawati Region, based on aggregate ICA diversity score (listed in Chapter 2). This exercise is iterated for getting all national, international and total tourist footfall data across districts. Notably, population density is an important metric for this imputation exercise, as higher population density typically implies better performance in terms of amenities, growth, infrastructure, human capital, etc., which are important in attracting tourists.



Source: Department of Tourism of the Government of Rajasthan

Figure 3.2: National Tourist Footfall across Districts ('000)

Figure 3.2 presents the district-wise national tourist footfall statistics for 2019. The key drivers of tourist footfall in popular regions include the religious and spiritual appeal, traditional art, and the overall rural lifestyle. For example, Ajmer’s key attraction is the shrine of Khwaja Moinuddin Chishti, while Sirohi is home to numerous temples and shrines. In addition, proximity and connectivity act as key drivers of tourism in the state. For example, national highway (NH)-8, which connects Delhi to Ahmedabad, passes through districts such as Jaipur, Ajmer and Udaipur. Similarly, NH-14 connects cities in Northern Gujarat to NH-8 in Beawar in Pali. Also, the three most trafficked airports in the state – Jaipur, Udaipur and Jodhpur – lie near the popular tourism destinations.



Source: Department of Tourism of the Government of Rajasthan

Figure 3.3: International Tourist Footfall across Districts ('000)

Figure 3.3 presents the district-wise international tourist footfall statistics for 2019. The figure suggests that locations with good air connectivity are the hotspots for international tourists. Jaipur connects to other tourist destinations like Delhi and Agra through tourism circuits, while Udaipur is close to Mount Abu and numerous attractions in Gujarat. These hotspots are also home to numerous markets encompassing all

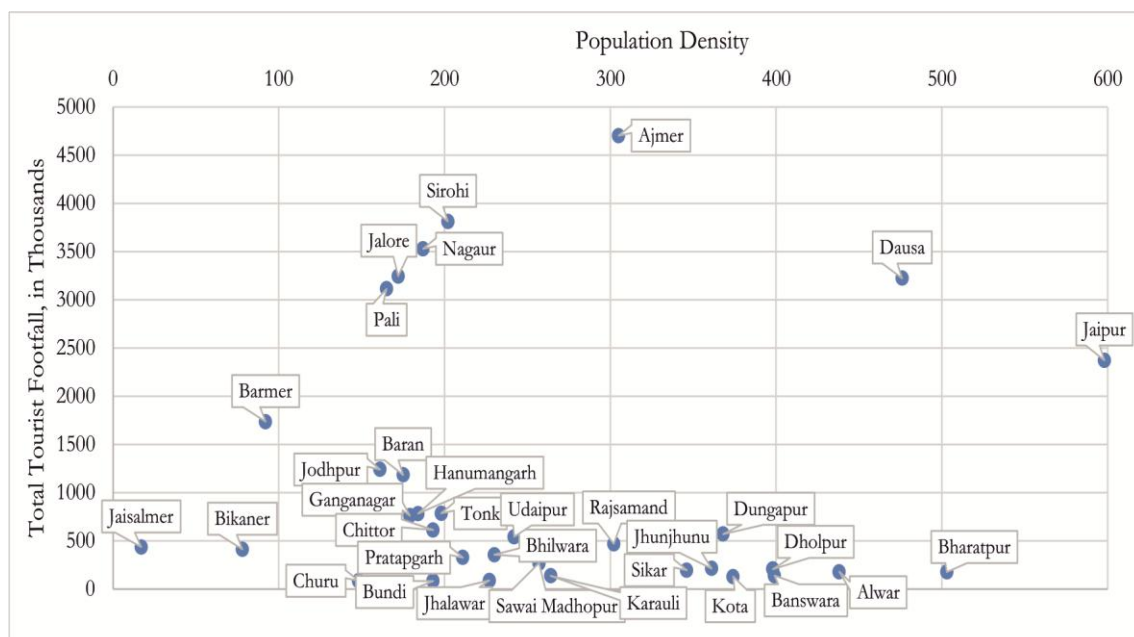
segments of buyers; forts and palaces, cuisine, high quality Rajasthani handicrafts and textiles, and gems and jewellery. These places also score high in hospitality with heritage properties and havelis turned into hotels, and frequent events and fairs by local folk art practitioners as well as renowned international artists.

The overall extent of consumption of ICAs, as measured through tourist footfall, indicates important differences between national and international tourists. The following patterns emerge, on average:

1. International tourists prefer destinations that are connected by air. These include places like Jaipur and Udaipur. For national tourists, road and rail connectivity, especially through national highways, seem more important.
2. International tourists prefer a relatively well-developed market in their interface with Rajasthani ICAs. Besides, luxury experiences such as destination weddings, and showcased events and fairs also attract them considerably. Domestic tourists prefer pilgrimage, religious and historical locations.

Tourist Footfall vis-à-vis Population Density, ICA Diversity and Participation

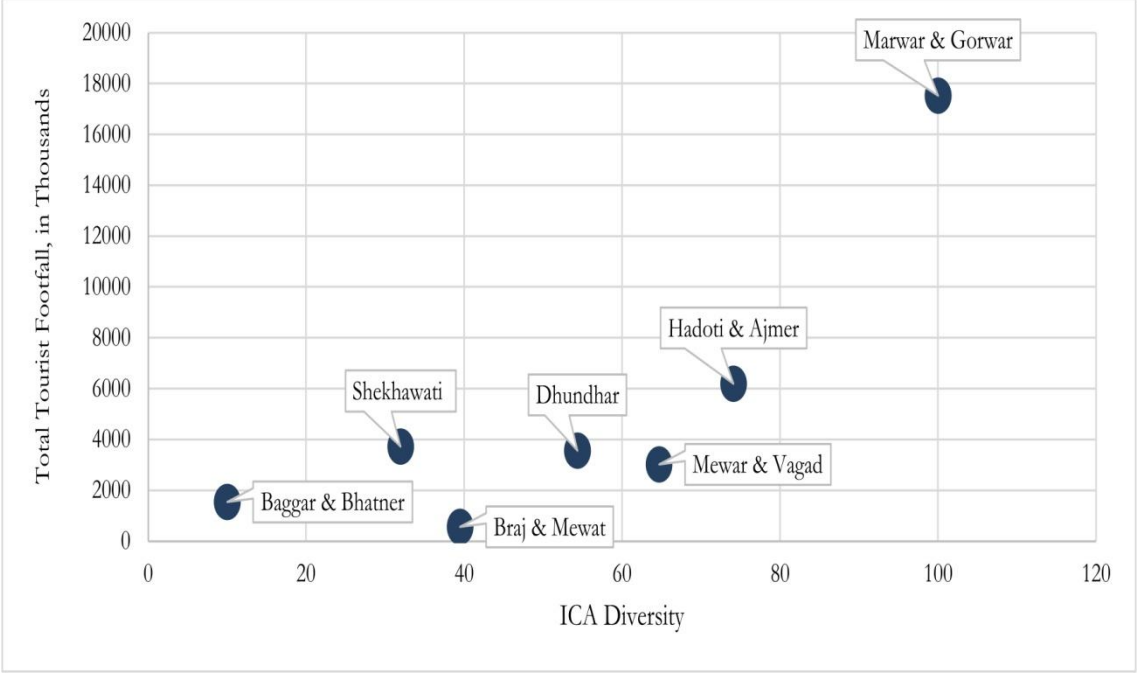
Figure 3.4 presents a scatterplot for the association of tourist footfall with population density. It identifies districts that are relatively well performing in attracting tourists over others, on the basis of population densities. Notably, districts in the Marwar region are prominent in this list. As noted, before higher population density typically signals better performance in terms of amenities, growth, infrastructure, human capital, etc., which are important in attracting tourists. The figure suggests that there are many districts attracting tourists over and beyond the appeal for better amenities. They include Ajmer, Jaipur, Dausa, Sirohi, Jalore, Nagaur, Pali, Barmer, Baran, Jodhpur, Hanumangarh, Jaisalmer, Bikaner, Ganganagar, Chittor, Tonk, Udaipur, Rajsamand, Dungapur, Jhunjhunu, Dholpur, Bharatpur, Pratapgarh, Churu, Bundi, Jhalawar, Sawai Madhopur, Karauli, Kota, Banswara, Alwar, and Jaipur.



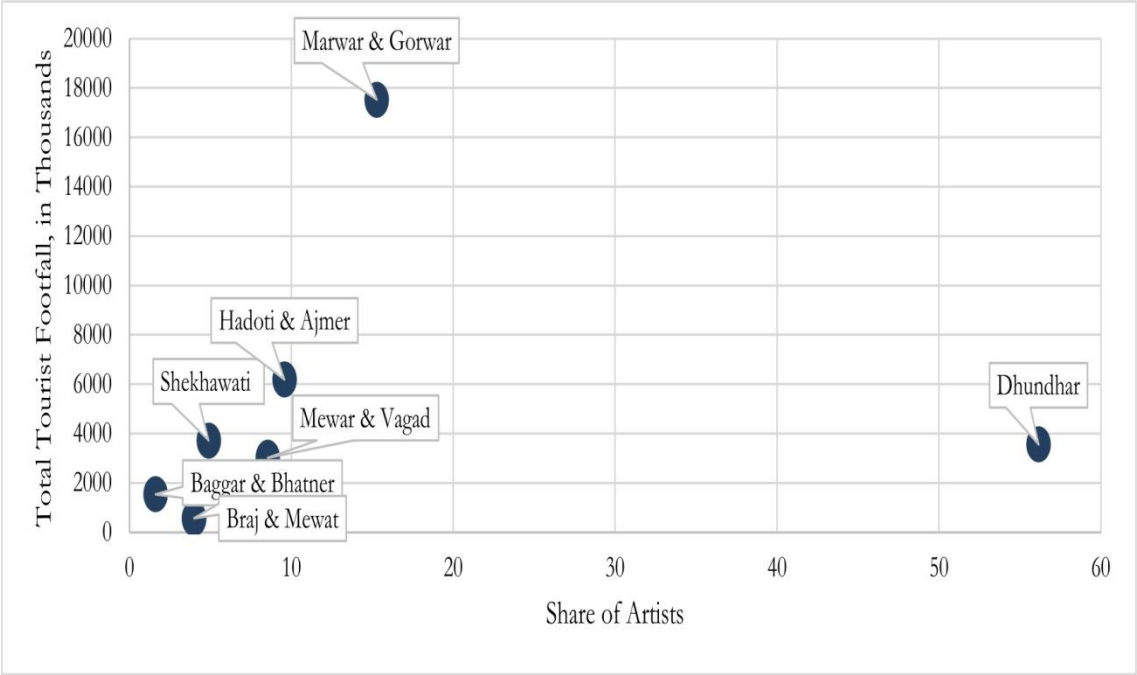
Source: Census (2011), Department of Tourism of the Government of Rajasthan

Figure 3.4: Association between Tourist Footfall and Population Density

Figures 3.5 and Figure 3.6 present a scatterplot for the association of tourist footfall with ICA diversity, and with artist participation respectively. They identify regions that are relatively well performing in attracting tourists than others, on the basis of ICA diversity and participation. The two metrics are tourism pullers, while several regions have additional features that attract tourists. They include, for example, Ajmer for religious and pilgrimage and Jaipur for connectivity and market.



Source: Department of Tourism of the Government of Rajasthan, On-ground Survey, Stakeholder consultations



Source: Department of Tourism of the Government of Rajasthan, JKK (2020)

Figure 3.5: Association between Tourist Footfall and ICA Diversity

Overall, tourist footfall can be attributed to the presence of amenities, infrastructure and markets, as well as diversity of ICAs. The scatterplots above suggest that there are additional features that may pull tourism in the state, including overall macroeconomic condition, season, etc. More importantly, however, Rajasthan provides tourists the opportunity to experience a unique cultural heritage, where both tangible and intangible cultural assets form an integral part.

Below, we look at two cases that detail qualitative aspects of ICA consumption, hitherto captured only to a limited extent in the discussion so far.

CASE STUDIES

Integrating Village Festivals with Mainstream Tourism Packages

A large number of festivals in Rajasthan have only local accessibility. For example, Mamosar – a small town in the Churu district of the Shekhawati region – celebrates a community-led two-day *Mamosar Utsav* around Diwali. On average, this festival brings together over 200 artists and craftsmen from different parts of the state to celebrate folk traditions. However, Churu witnesses one of the lowest tourist footfalls in the state.

Churu, as a tourist attraction, has abysmally limited presence in existing tourism packages. The Shekhawati Circuit, in almost all cases, includes only Sikar and Jhunjhunu. Churu's inclusion in this circuit can significantly increase its outreach and tourist traction. In turn, through a multiplier effect, tourist footfall in the small villages will have a positive impact on the overall socio-economic conditions of artists and art-form practitioners. To this end, an outreach can be curated targeting both the district cultural calendar and social media platforms such as Facebook and Instagram. Authenticity can be confirmed through geo-tagging. The speed of online information transmission may see a quick-time growth in audience loyalty for this village-level festival. So much so, it may also find a place in tourists' itinerary logs. Several such village-level festivals exist in the state.

Institutional Information Interpolability on ICAs

Rajasthan is home to several institutions, spread across regions, which nurture local art forms and traditional craftsmanship. These institutions have amassed a large pool of information, especially for the region of their operation, with only a few of them having a holistic purview of the state. This largely piecemeal information-stacking limits the ability of the Government and society to address pertinent challenges and tap into the opportunities. Interpolating this information across institutions will ensure more efficient policies for artists and artisans, as well as their improved implementation. The Government can address this problem through two complementary means – (A) establishing a common portal (e.g., a virtual cloud or physical server) (B) organizing frequent inter-institution meetings, conferences and exhibitions (MICE).

This interpolability will also address the problem associated with limited outreach of local art forms. With centralized, government-backed and easily available information, all locations in the state will get sufficient traction. In addition, it will prompt tourists to prefer Rajasthan over other destinations, mainly because of large-scale availability of options from a diverse set of cultural forms.

Government assistance for data interpolability should focus on capital, audit, and analytical support. At a later stage, and through private support, local festivals, fairs and events can be aggregated with the mainstream cultural display. Tourists travelling from the world over will have easier access to reliable information, leading to increased footfall.

Policy Lever

Rajasthan is home to a varied range of cultural heritage, attracting tourists from around the world. Through a multitude of state-led efforts over the years, tourism has been a key driver of economic growth in the state. To enhance the overall tourist footfall in Rajasthan, policies can be directed towards the following:

1. Availability of amenities and infrastructure, including means of transport, are prominent tourist pullers. These should be the leading priority for a growing and sustainable tourism landscape in the state.
2. Institutions in the state have amassed a bulk of information pertaining to culture, but on a piecemeal regional basis. Interpolating this information will ensure more efficient policy making and implementation. Additionally, it will ease several important aspects of tourism in the state, such as outreach, community participation and integration with the market. Towards this, the Government should provide (technical) hosting support (such as a virtual cloud or physical server) and audit support.
3. There is a need for a framework to integrate community festivals (typically hosted in villages) with mainstream cultural offerings. This should have information on all events hosted in the state, detailed at the levels of regions and districts. This will be critical in dynamically and equitably striking a balance between the culture and the market.
4. The government, as a medium-term strategy, should declare tourist circuits as Special Tourism Zones (STZ). These STZs will be exempted and may have time-bound fiscal and non-fiscal supports to incentivize community participation.

4. MARKET LINKAGE AND INTEGRATION

Culture plays an important role in market linkage – between people, between people and industries, and between industries. Often this is shaped by shared beliefs, values, languages, traditions and art forms, stimulating economic activity. This is especially vital for the Rajasthan economy, as the state has one of the most diverse cultural landscapes in the country. This chapter assesses the backward and forward market linkages of cultural activities with other industries. This is important from a policy perspective, as a stimulus, through a market-linkage multiplier effect, affects activity in the entire economy. That is, an assessment of linkages suggests how a stimulus to promote cultural activities would impact other industries, and thus the economy.

Industry Linkages with Cultural Activities

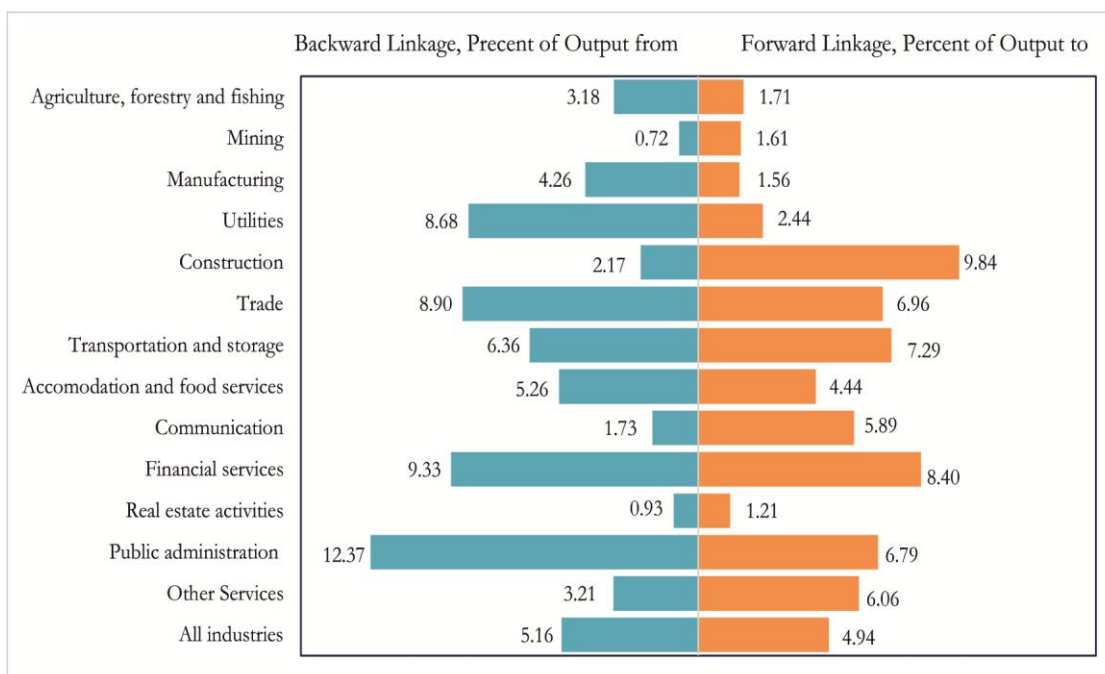
To evaluate industry linkages with cultural activities, we follow a three-step exercise. First, as a prior, we use the input-output matrix (IOM) for industrial activities of India. It is taken from the Central Statistical Organisation, as curated on the Organisation for Economic Cooperation and Development (OECD) Stats interface.³ Notably, IOM is not available at the state level. So, IOM for India is the next best alternative. Second, we devise the backward and forward market linkages of all industries with the Arts and Entertainment industry – which is taken as the proxy for cultural activities. Finally, we reiterate the linkages based on information from secondary research, stakeholder consultations and on-ground surveys. Figure 4.1 presents a graphical illustration of the methodology.



Figure 4.1: Method for Inter-Industry Linkages with Cultural Activities

Figure 4.2 presents backward and forward linkages of cultural activities with the other industries. The most prominent backward linked industries, in descending order, are public administration, financial services, trade and utilities. It implies that injections to or withdrawals – monetary or non-monetary – from these industries are likely to have a larger impact on cultural activities than on other industries. Interestingly, these linked industries suggest a large role for the Government in promoting cultural activities, especially given its monopoly over public administration and utilities.

³ We use India's IOM for 2016, the latest year for which data is available.



Source: OECD Stats, Primary survey and consultations

Figure 4.2: Industry Linkage of Cultural Activities

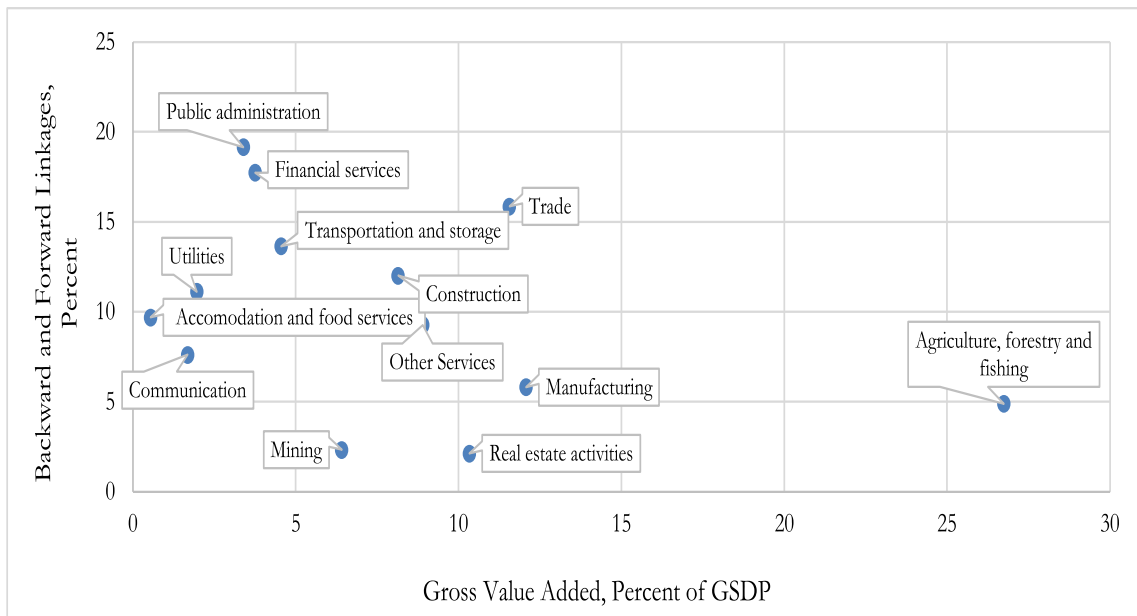
The most prominent forward linked industries, in descending order, are construction, financial services, transportation and storage, trade, and public administration. It implies that, from an industrial policy standpoint, stimuli to cultural activities in the state are likely to have the largest impact on these linked industries. Even in this case, as in the case of backward linkages, the Government has a large role to play.

Industry Linkage with Cultural Activities vis-à-vis Industrial GVA

Figure 4.3 presents a scatterplot for aggregate (i.e., backward and forward linkages combined) industry linkages vis-à-vis gross value added (GVA) of the corresponding industries. It suggests that several industries have high linkage with cultural activities, including seven industries with 10 percent or more weightage. They are of key importance in stimulating cultural activities in the state. But, their overall weight in the economy, as seen through their share in GSDP, is dispersed. It implies that for an economy-wide absolute effect on cultural activities, industry linkages are as important as the size of the industry. Alternatively, industries with larger size have more participation, implying that a stimulus to such industries is likely to reach a larger mass of cultural practitioners. In contrast, industries with smaller size have lower participation, which implies that a stimulus to such industries may have limited reach to masses practising cultural activities.

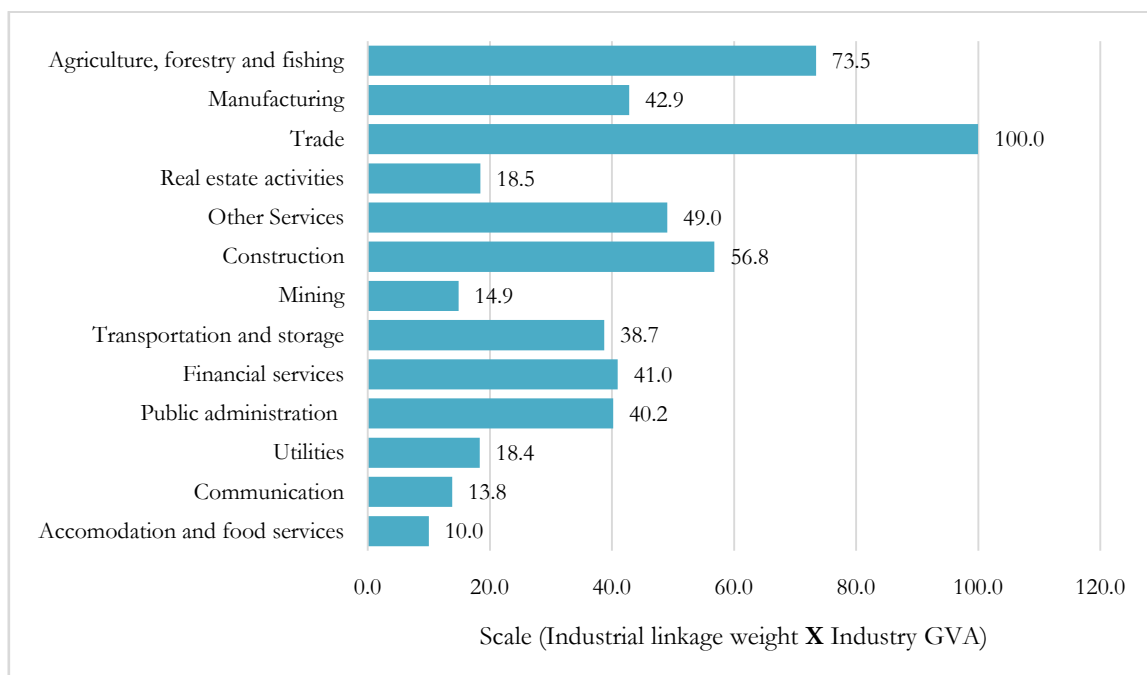
Figure 4.4 presents one way to address the issue, where we interact industry linkage weights with the size (i.e. GVA) of the corresponding industry. The resultant statistic – industrial linkage momentum – is depicted on a scale of 10 to 100, with 100 representing the maximum momentum. It suggests that stimulus to trade (wholesale and

retail combined) is likely to have the largest impact on cultural activities, followed by agriculture, forestry and fishing, and construction. Notably, these industries also have a larger informal base and the corresponding economic agents have lower per capita income. Thus, the promotion of cultural activities through industrial linkages calls for a bottom-of-the-pyramid targeting, which aligns coherently with the redistributive role of the Government.



Source: OECD Stats, Primary survey and consultations, Rajasthan Economic Review of 2020-21

Figure 4.3: Industrial Linkage of Cultural Activities vis-à-vis Industrial GVA



Source: OECD Stats, Primary survey and consultations, Rajasthan Economic Review of 2020-21

Figure 4.4: Industrial Linkage Momentum of Cultural Activities

Digital Market for Cultural Activities

Live performances typically have high reception levels. Digital technologies provide a complementary way of connecting culture with the market. In the case of Rajasthan, for example, due to the pandemic, several ICA forms adapted to the digital medium. A snapshot of these listed below.

- ❑ Department of Tourism arranged live streaming of the Gangaur procession on social media (Times of India, 2018)
- ❑ Desert Festival was broadcast live on YouTube in early 2021 (Hindu Business Line, 2020))
- ❑ Organizers of the Rajasthan International Folk Festival conducted several events online (Financial Express, 2020)
- ❑ Organisers of the Jaipur Literature Festival tracked social media trends and worked closely with social media teams to increase traction (Jaipur Literature Festival Website)
- ❑ Manganiyar musicians conducted several online shows in 2020 (Hindu Business Line, 2020)
- ❑ Kathputli puppetry had several online sessions, conducted by Rajasthan Studio (Times of India, 2021)
- ❑ Ghoomar dance gained digital traction with its wide coverage in the Bollywood film ‘Padmaavat’ (Outlook India, 2017)

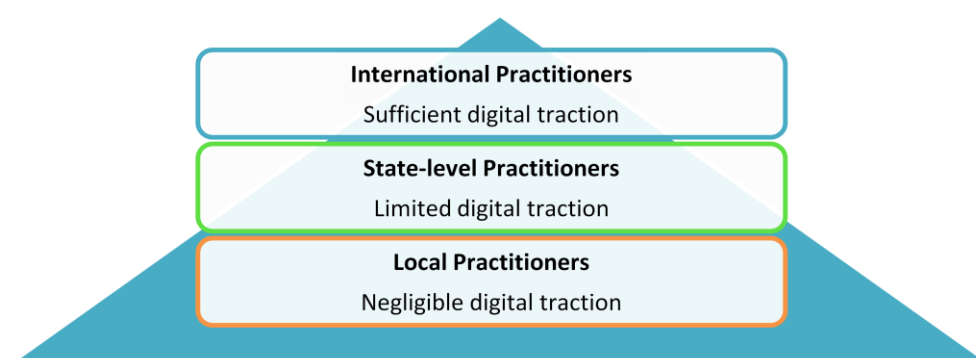


Figure 4.5: Pyramid Structure of Cultural Practitioners and Digital Traction

Our stakeholder consultations and on-ground survey offered several interesting dimensions to digital market linkages with cultural forms. Typically, the market for cultural forms operates at three layers in a pyramid-type structure (Figure 4.5). At the top, practitioners cater to all markets – international, national and local. Middle layer practitioners cater to mostly intra-state and local markets. The lower layer caters to the local market only. Given such market demand, it is convenient for top-layer practitioners to use online platforms and gain sufficient traction. Practitioners at the middle and lower layers have limited and negligible online traction, respectively. Internet penetration in the state further corroborates this layer-structure. Since the top-layer performers cater to the international market, Rajasthan’s internet penetration of 35 percent (in 2019-20) is not a binding constraint on them. In contrast, for the middle- and lower-layer practitioners,

internet penetration in the country poses a binding constraint. With rising internet penetration, it is likely that digital's share in the overall marketization of cultural activities will increase several-fold.

Case Studies

Lessons from Spain and France

Spain and France are two leading countries in marketization of their cultural assets. We assess the market linkages of these two economies using the same approach as adopted for Rajasthan. We also refer to pertinent literature on culture activities in these two economies. This exercise offers three important lessons, which are agnostic to differing economic structures, for promoting cultural activities. We list these below.

1. The publishing, audio-visual and broadcasting sectors in France exhibit strong linkages with its culture activities. This suggests that promoting the digital and advertising landscape is a key strategy for promoting cultural activities.
2. ICAs in France and Spain are protected by strong intellectual property regulations. Therefore, others who intend to reproduce or use an ICA form must pay royalty. This not only increases the revenue to the original practitioner, but also incentivizes promotion and marketization of ICAs. Several handicrafts and folk-art forms in Rajasthan may benefit from this approach.
3. Quality checks and standardization are usual practices in Spain and France, especially when intangible and tangible cultural assets are embedded. These allow an art form to enter the international markets and attract investments from around the world. The marketization of cultural forms and artifacts in Rajasthan needs such regulatory support to enhance the positive spillovers of cultural activities to the economy.

Stones of Rajasthan

Rajasthan is endowed with a diverse mix of tangible and intangible cultural heritage. While dedicated policies exist and resources are allocated for tangible cultural heritage, the visibility of intangibles in this regard is relatively low. For instance, across Rajasthan there are over 20 varieties of stones. These are used in the creation of monuments and architectures, which attract tourists from around the world. To promote the use of these stones beyond the state level, international expositions such as Stone Mart are organized by the state. In addition, organizations such as the Centre for Development of Stones (C-DOS) pursue dedicated research on the variety of stones in Rajasthan among other focus areas.

In contrast, only a few ICA forms have similar visibility in Rajasthan, while information on a large number of ICA forms is locked locally. The state should dedicate resources, financial and technical, towards organizing frequent exhibitions of such ICA forms. Chapter 2 presents a comprehensive list of the ICA forms in the state.

Policy Lever

Cultural activities present intense backward and forward linkages with industries in Rajasthan. This makes cultural promotion entwined with the overall economic development of the state. However, considerable scope for targeted policy intervention remains for further promotion of cultural activities in the state through inter-industry linkages, especially through emerging opportunities in the digital medium.

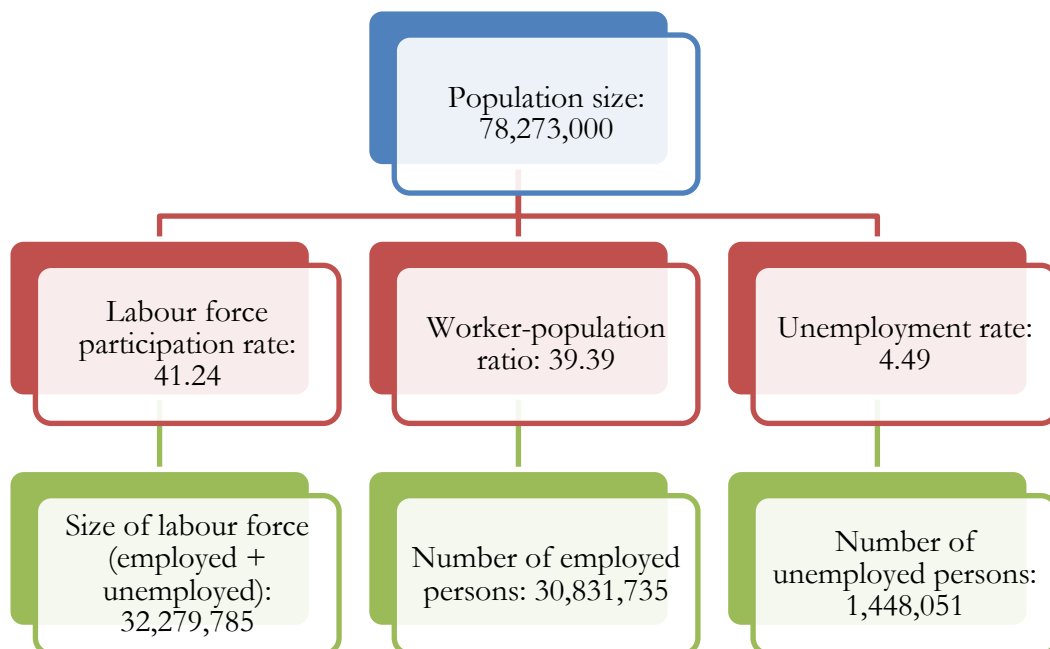
1. In recent times many individual endeavours have been able to attract a large number of eyeballs through digital spaces such as YouTube, Instagram and Facebook. Activities related to ICAs too have considerable potential to thrive using such mechanisms. However, it requires a minimum ancillary skill, such as creating cinematic videos and advertisements, to gain traction. The Government may offer such services through its existing capacities in different districts. Such endeavours may have a spiralling effect, as penetration in digital spaces, with rising eyeballs, further attracts domestic and international marketers and loyalists.
2. Museums, trusts or other organisations can be prompted to hold commercial galleries which provide marketization opportunities for local artists. Importantly, they can hold state level competitions such as in jewellery making where the winner gets, for example, a retail contract for their design in addition to any other nominal reward. Through such competitions, local artists will get an opportunity for further integration into the industry, while promoting the cultural landscape in the state.

5. EMPLOYMENT

The diverse cultural landscape of Rajasthan and its importance on the global tourism map have a positive impact on the state economy. UNESCO (2012), for example, notes that culture and tourism have the potential to be one of the leading sectors in Rajasthan for promoting growth. Therefore, participation of the masses, directly and/or indirectly becomes critical for this sector. This makes assessment of the employment supported by ICAs of vital importance. From a policy standpoint, this assessment will facilitate efficient resource allocation for the sector and create a system to track the linkages of people with cultural assets in the state.

State of Employment in Rajasthan

Rajasthan's population is approximately 78.27 million (Figure 5.1). Of this, nearly 32.3 million is in the labour force, at a participation rate of 41.24 percent. Of this labour force, nearly 95.51 percent people (30.83 million) are employed, while 4.49 percent (1.45 million) are unemployed. This leaves a considerable task on the hands of the Government, to generate suitable employment opportunities, directly and/or by creating a conducive environment for the private sector to absorb them.

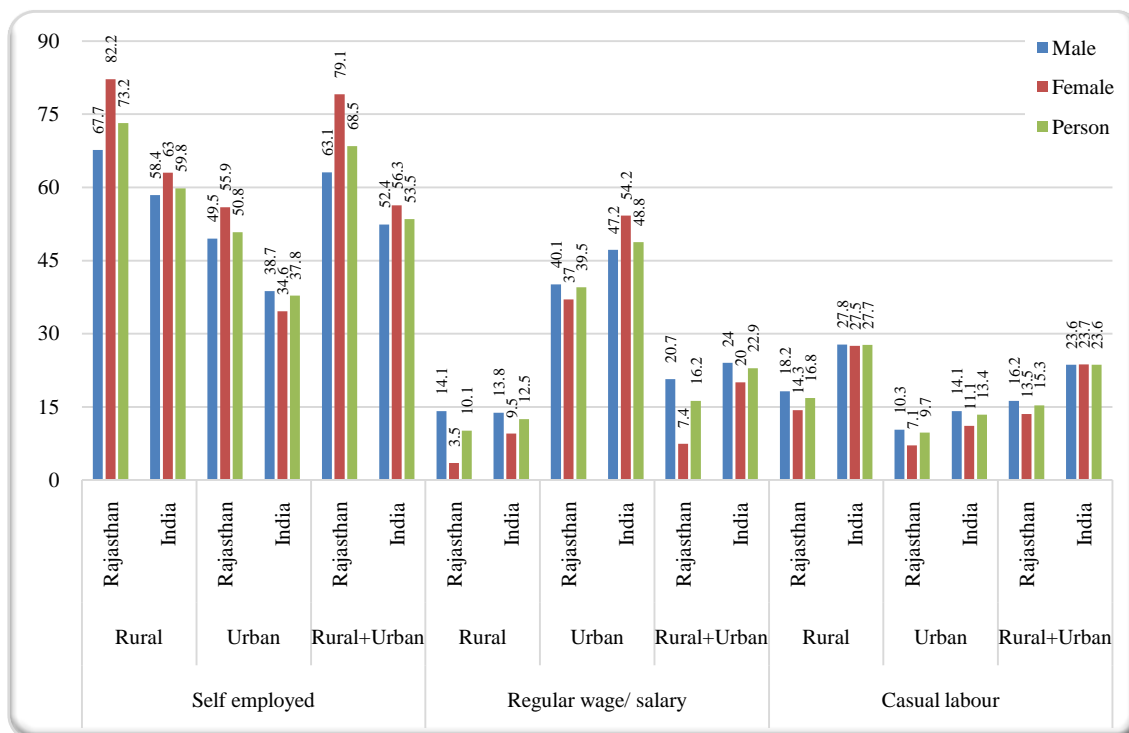


Source: Census Projection, Periodic Labour Force Survey (2019-20)

Figure 5.1: Population and Labour Force

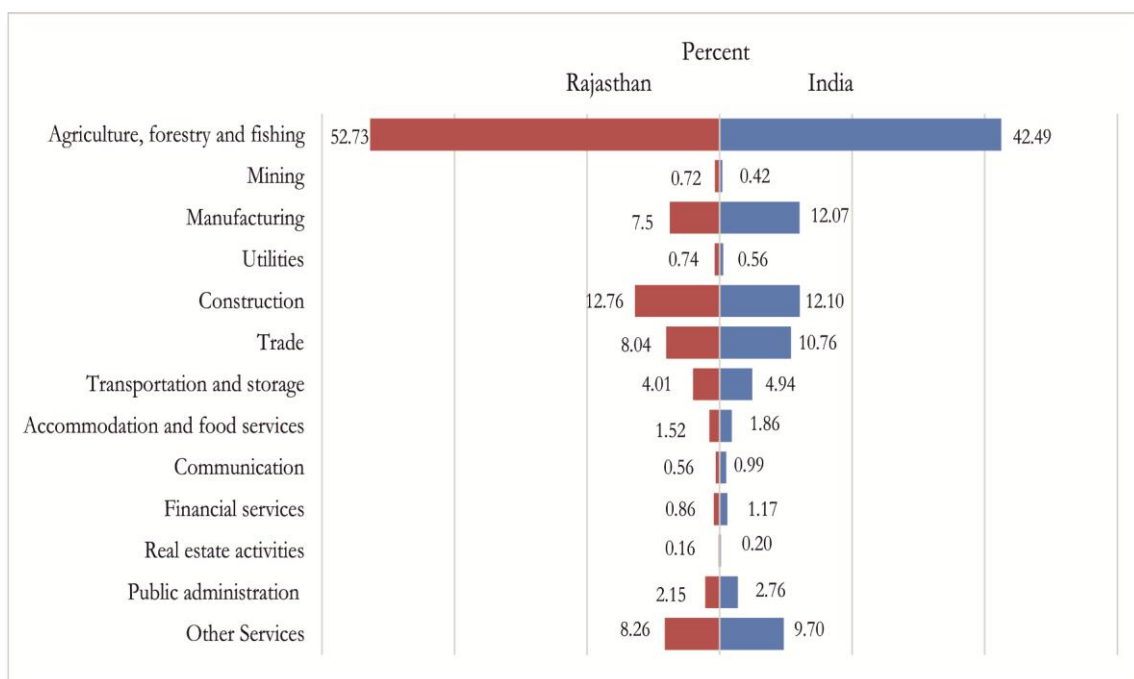
Figure 5.2 presents the share of employment in the state by type – self-employment, regular wage/salary work and casual employment. It also presents the corresponding rates for India. Three highlights emerge from this figure. First, relative to the Indian average, Rajasthan's workers are more engaged with self-employment across genders. This employment type also witnesses more representation from females than males. Second, employment across types and genders is higher in rural areas than in

urban, likely because of lower reservation wages in the former. Finally, the proportion of non-regular wage/salary workers, across gender and location, is larger in Rajasthan than the all-India average. This implies higher employment risk and lower social security for workers in Rajasthan, on average.



Source: Periodic Labour Force Survey (2019-20)

Figure 5.2: Employment by Type, Usual Status



Source: Periodic Labour Force Survey (2019-20)

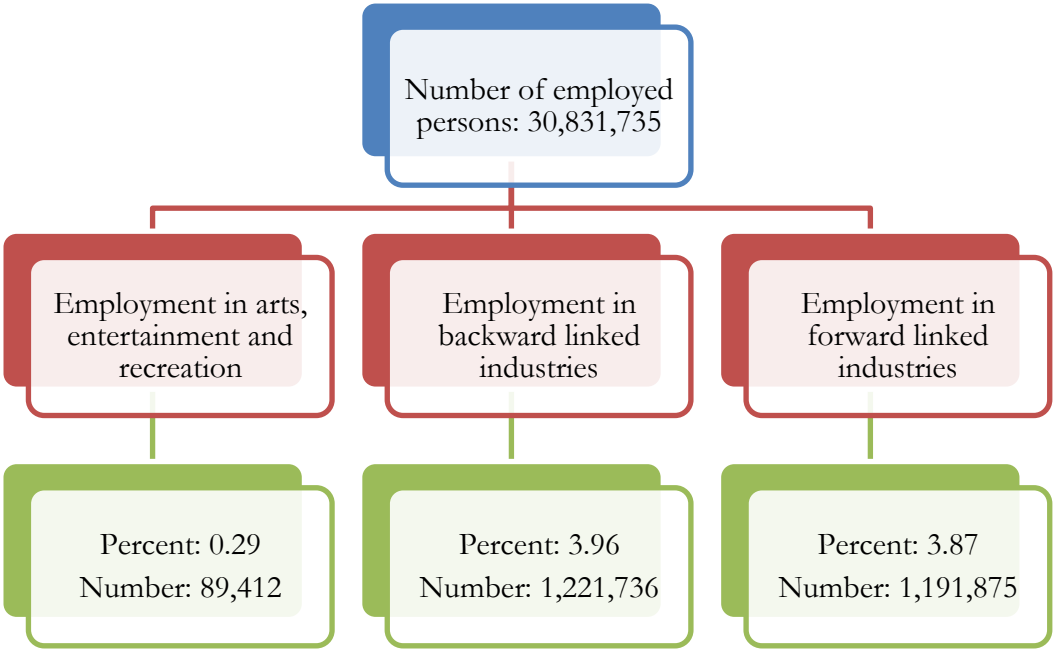
Figure 5.3: Industry-wise Share of Employment, 2018-19

Figure 5.3 looks at the industry-wise share of employment for Rajasthan as well as for India. It suggests that Rajasthan has a larger agricultural employment base than average. Among non-agricultural industries, the proportionate share of employment in Rajasthan, relative to India, is higher for construction, utilities and mining. Overall, to the extent labour is equally productive across the country, this figure suggests considerable inter-state trade opportunities based on labour participation across industries.

Employment in Cultural Activities

To ascertain employment in cultural activities, we draw on the Periodic Labour Force Survey of 2019-20. The survey presents a detailed break-up of employment across industries. We take employment in Arts, Entertainment and Recreation as the metric to represent the direct employment into cultural activities. It stands at 0.3 percent of the total employed pool, or 89,412 in absolute number terms.

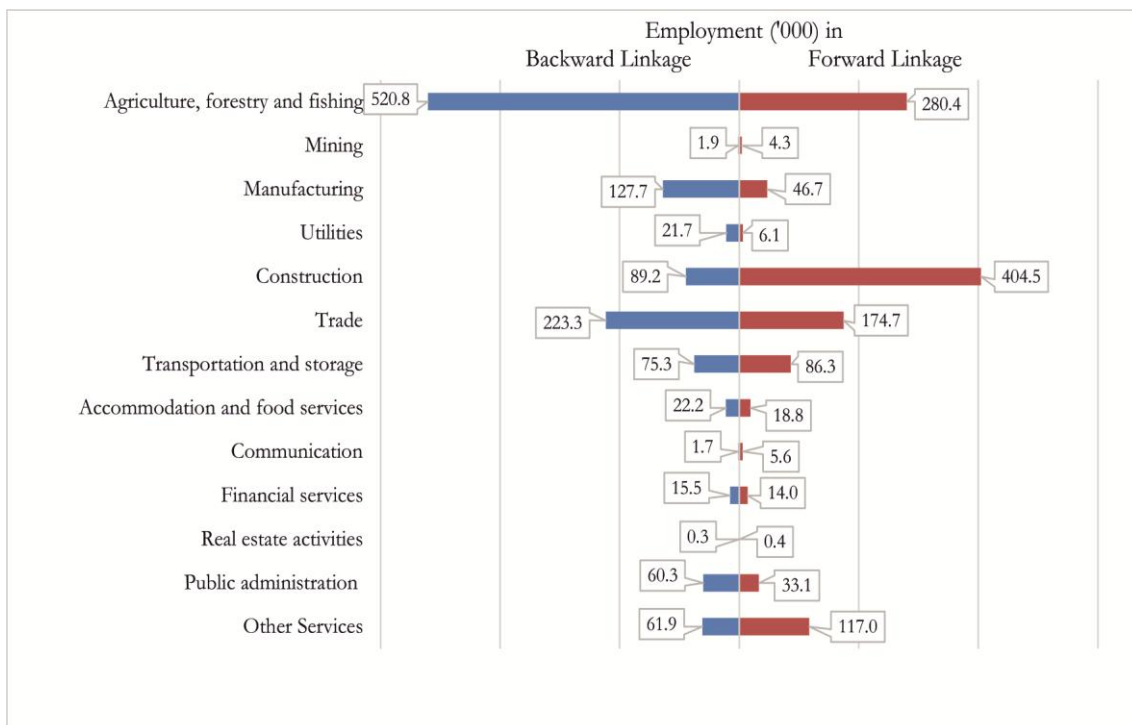
There also exists inter-linkage between industries in Rajasthan. For instance, while a heritage hotel is a tangible component accounted for under accommodation and food services, events hosted by hoteliers such as traditional folk music and dance performances are intangible in nature. Similarly, some artists pursue an art form which is marketed as a manufactured product. Thus, it becomes important to account for employment attributable to cultural activities in these linked industries. We draw on inter-industry linkages, as constructed in Chapter 4, to approximate this.



Source: Author calculation based on Periodic Labour Force Survey of 2019-20, OECD Stats, Primary survey and consultations

Figure 5.4: Employment into Cultural Activities

Figure 5.4 presents the employment statistics from the linked industries that are attributable to cultural activities. Notably, backward linked industries/activities account for 3.96 percent and forward linked industries/activities account for 3.87 percent of the employment attributable to cultural activities. Overall employment, on account of direct engagements and through linked industries/activities, accounts for roughly 8.12 percent of the total employment pool in the state, or roughly 2.5 million persons. As such, employment into cultural activities is almost as large as (direct employment in) the wholesale and retail trade industry, which is the third largest industry in the state after agriculture, forestry and fishing, and construction. Figure 5.5 presents an industry-wise break-up of employment numbers in the linked industries.

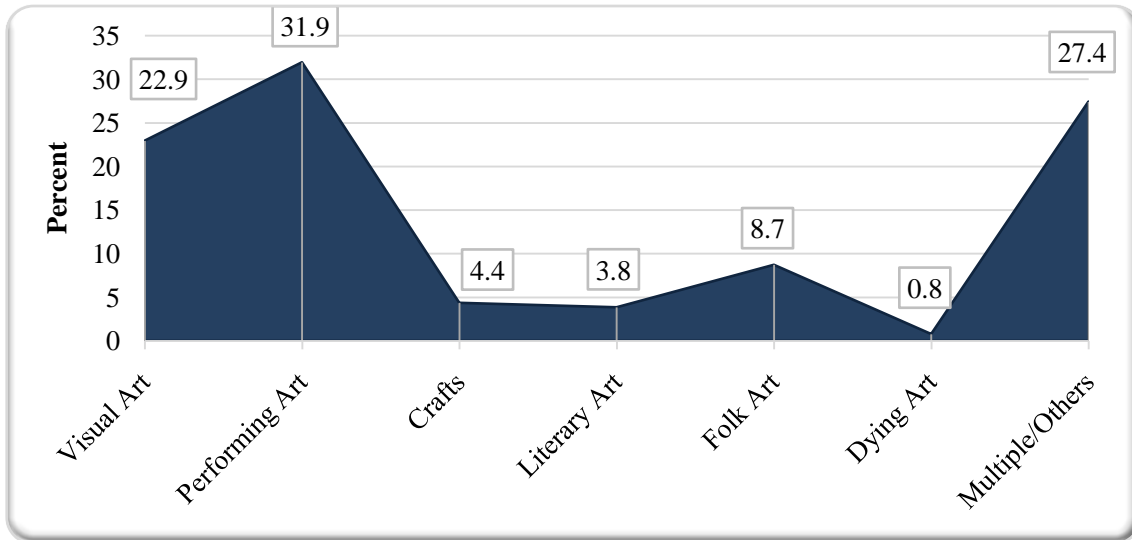


Source: Author calculation based on Periodic Labour Force Survey, 2019-20

Figure 5.5: Direct and Indirect Employment in cultural assets of Rajasthan

Employment into ICAs based on Type of Art Forms

We take a deeper look at the persons engaged directly in cultural activities using data from surveys conducted by the Jawahar Kala Kendra (JKK) in 2020-21. Figure 5.6 presents a break-up of employment based on the type of art form practised. Performing arts, visual arts, and folk arts account for the majority of direct employment into cultural assets, with a share of 31.9 percent, 22.9 percent and 8.7 percent respectively. The performing arts consist of vocalists, instrumentalists, theatre artists, and puppeteers among others. Visual artists include digital artists, graphic artists, illustrators, cartoonists, painters. Folk artists include musicians and dancers practising traditional folk music and dance. Interestingly, one in almost every four artists practises multiple art forms, suggesting a considerable degree of malleability in practising art forms.

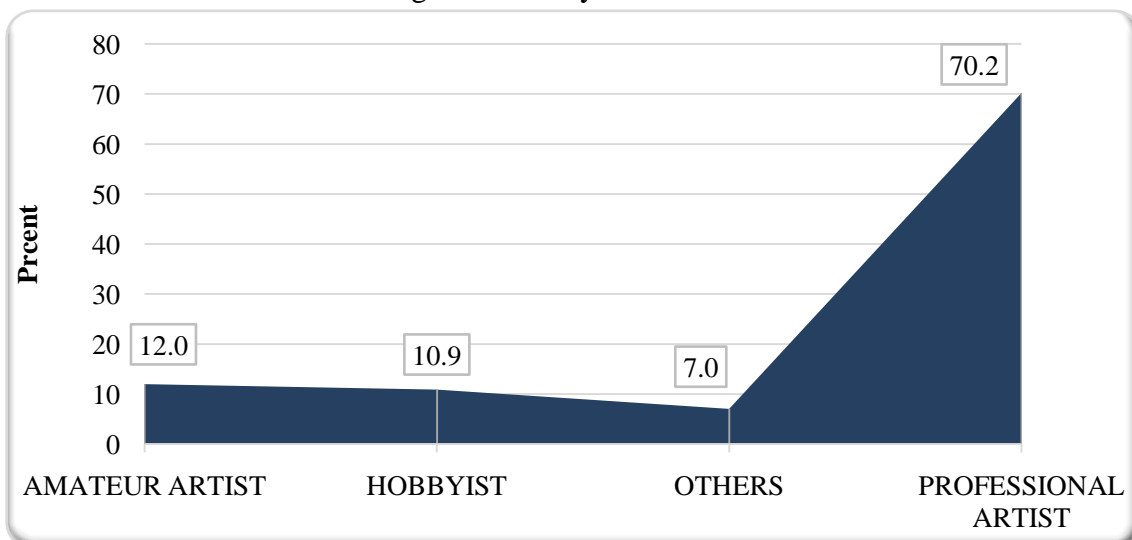


Source: Author calculation based on Jawahar Kala Kendra (2020-21)

Figure 5.6: Employment based on Type of Art Forms

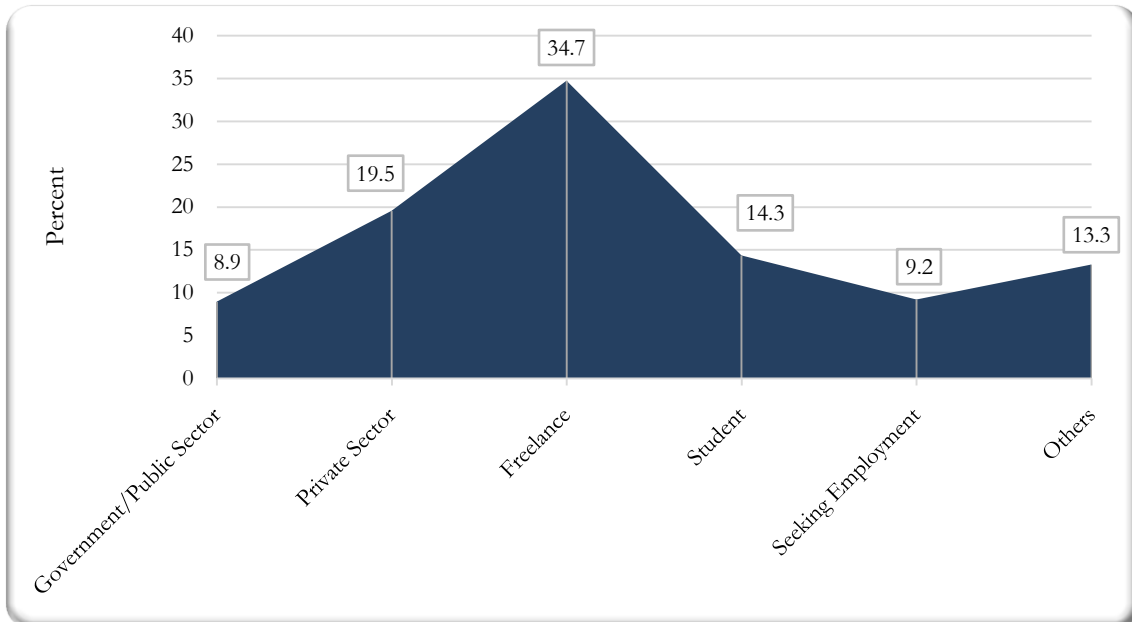
Nature of Employment into ICAs

Figure 5.7 presents a break-up of employment based on the nature of practice. Almost 70 percent of the artists are professionals, while the remaining 30 percent are non-professionals. Importantly, only about 28 percent of these practitioners have public or private sector employment, which may be deemed the regular core employment in cultural activities. The remaining 72 percent, with the majority engaged on a contractual basis (about 35 percent), represents the vulnerable engagement into cultural activities. This vulnerable group typically has a large probability of choosing other activities as the source of livelihood in case of a shock such as the pandemic or if they receive a higher income support elsewhere. Notably, the size of the vulnerable group is based on a minimalist viewpoint – it may shoot up, for example, to the extent that there are non-regular engagements in the private sector. A similar inference also emerges from our stakeholder consultation and on-ground survey



Source: Author calculation based on Jawahar Kala Kendra (2020-21)

Figure 5.7: Nature of Practice among Artists

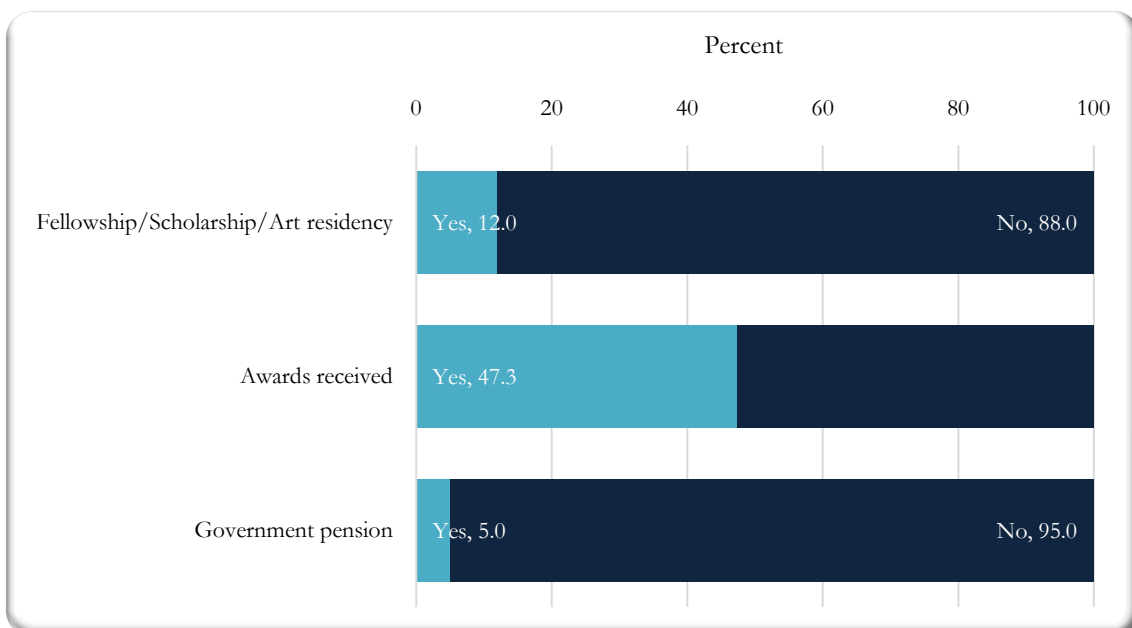


Source: Author calculation based on Jawahar Kala Kendra (2020-21)

Figure 5.8: Nature of Employment among Artists

Employment Support and Incomes

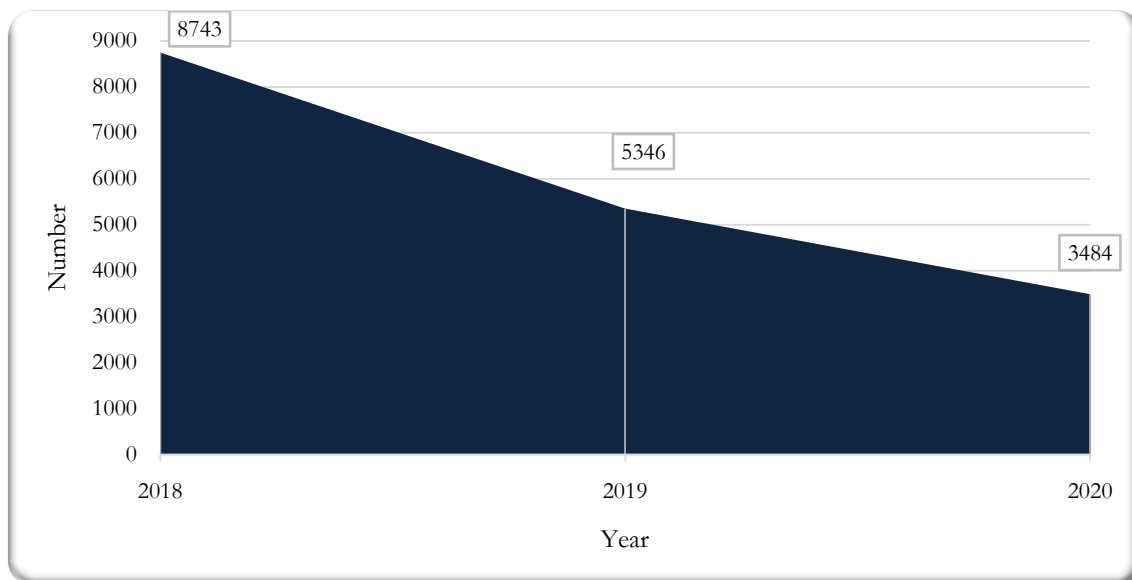
In terms of employment support, we assess three parameters— fellowship/ scholarship/art residency support, awards received and government pension. Figure 5.9 presents the share of beneficiaries out of the total number of respondents. It suggests that while some support exists for artists, it is important that the Government supplement their support with further Program-based infusion, in addition to creating a conducive environment for private sector involvement.



Source: Author calculation based on Jawahar Kala Kendra (2020-21)

Figure 5.9: Employment Support

Our on-ground assessment also suggests a considerable transmission leakage in the reach of government support. Two examples are noteworthy. First, there is a decline in the number of artisans with IDs, by 36.8 percent during 2018-20. It is because of both supply-side as well as demand-side reasons. Supply-side reasons include hurdles in registration and/or issuance. Demand-side reasons include declining interest among artisans to pursue their art as a source of employment. Second, as a relief measure to artists due to the pandemic, the state government issued support of Rs. 5000 per head to artists across the state. However, due to gaps in implementation, the number of beneficiaries remained limited.



Source: Udyam registration certificates

Figure 5.10: Artisans with active IDs

To increase the reach of such support initiatives, from a policy standpoint, regulations towards ease of compliance will improve the efficiency of resource allocation. Low income coupled with a weak safety net play a significant role in the decline in the number of folk artists across the state. Therefore, it is important to establish a grievance council to address the needs and concerns of artists and artisans.

Case Studies

Adaptation in Art Forms and Complementary Activities

The evolving nature of culture and markets has induced notable changes in traditional art forms of Rajasthan. To cater to consumer preferences, artists have adopted a contemporary approach in terms of presentation. For instance, the Kalbelia folk singers and dancers of today were once professional snake handlers. Now, their dance involves swirling in black and white dresses with the movements of a serpent while the men accompany them on the Khanjari and Poongi— traditional instruments played to ‘capture’ snakes. Similarly, the small community of Suthars, from the town of Bassi in the Chittorgarh district, are carpenter artisans who make the Kavadi, a mobile story-telling

device. These wooden shrines usually depict images of deities, dolls, and toys and tell the story of the artist's journey from the village to the city. The evolving patterns of culture and market led the Suthars to adapt their craft. In this process, artists have tried to maximize their reach to a wider audience.

Kavad Art of Bassi in the Akshara Exhibition, Singapore

The Akshara Exhibition in Singapore from December 2017 brought a commissioned order for Satyanarayan Suthar, a Kavad maker from Bassi (Source: Archives of Dastkari Haat Samiti). The commissioning is under the aegis of the Government of Singapore. This is a considerable opportunity for inspiring artists working in other arts. For instance, the Chippas are a caste of printers involved in the traditional dyeing of cotton fabrics using hand carved wood blocks, going back almost 300 years. With the advent of mechanisation, chemically dyed and machine printed fabrics, this art form has seen a steep decline. The miniature painting industry of Udaipur has a similar tale, which is forcing most artisans to diversify their practices to make ends meet. Opportunities to showcase such art forms, like Kavad making, may be handy in reviving them.

Hierarchical structure of the Miniature Painting Industry of Udaipur

The miniature painting industry of Udaipur exists as a complex patchwork of agents, with approximately 200 painters and twice as many people involved indirectly in the industry (Bautes 2004). It follows a hierarchical structure, headed by the official heir of the local royal dynasty. At the next level, stores owned by the Maharana Mewar Heritage Trust and emporium owners display expensive traditional Mewari paintings and employ many people. At the third layer, local sellers, street sellers and intermediary agents, such as tourist guides, facilitate intercommunity links and transactions.

From the painting supply side, Gurus ensure continuity in traditional miniature paintings, and are often engaged with young entrepreneurs working in cooperative or painting academies. Independent entrepreneur painters and contemporary artists practising their miniature painting as a non-commercial activity.

These agents, on the market and the supply side, exist in an interdependent environment. However, considerable asymmetry exists in appropriating returns from the system. Representatives of the local royal dynasty along with emporium owners having deep local networks are the major beneficiaries, while street sellers gain the least. On the other hand, most painters maximize their economic independence by diversifying activities and assuming multiple jobs, adopting strategies of intermediation, and diversifying their production to match the expectations of tourists. Only a few painters manage to build artistic careers based on their ability and talent alone.

Policy Lever

1. Several policies exist for artists and other practitioners of ICAs. However, gaps exist in transmitting the gains from these policies to the grassroots level. Therefore, an annual evaluation and monitoring of these policies should be an integral part of policy practice.
2. As we note, markets promote monetization from practising cultural activities. However, they induce asymmetric focus on some activities, while others remain under-practised. The Government may commission a detailed study on understanding this dynamic inter-relationship for efficient policy targeting.
3. Issuing IDs is an effective way to target policy implementation towards those engaged in cultural activities. However, as we note, the uptake of IDs is low and falling. The Government should consider reach-out as a strategy to issue IDs to practitioners through existing institutional and district administration capacities.

6. INVESTMENTS

Rajasthan, as the home to a vast range of traditional art forms and skilled artisans, encourages investments in both physical and human capital. For instance, under the State Budget 2021-22, Rs. 44,309 crore (USD 6.12 billion) were allocated for the education, sports, arts and culture sectors. This includes the development of sector specific infrastructure such as special purpose industrial parks and special economic zones (SEZs). In addition, the state has facilities like a single clearance window mechanism and one-stop-shop (OSS) facility for various licenses, permissions, and approvals for investments above Rs. 10 crores. Further, to incentivize business enterprises, the state government issued “The Rajasthan Investment Promotion Scheme” in 2019. This scheme is aimed towards promotion of economic activities in the state at a rapid and sustainable pace.

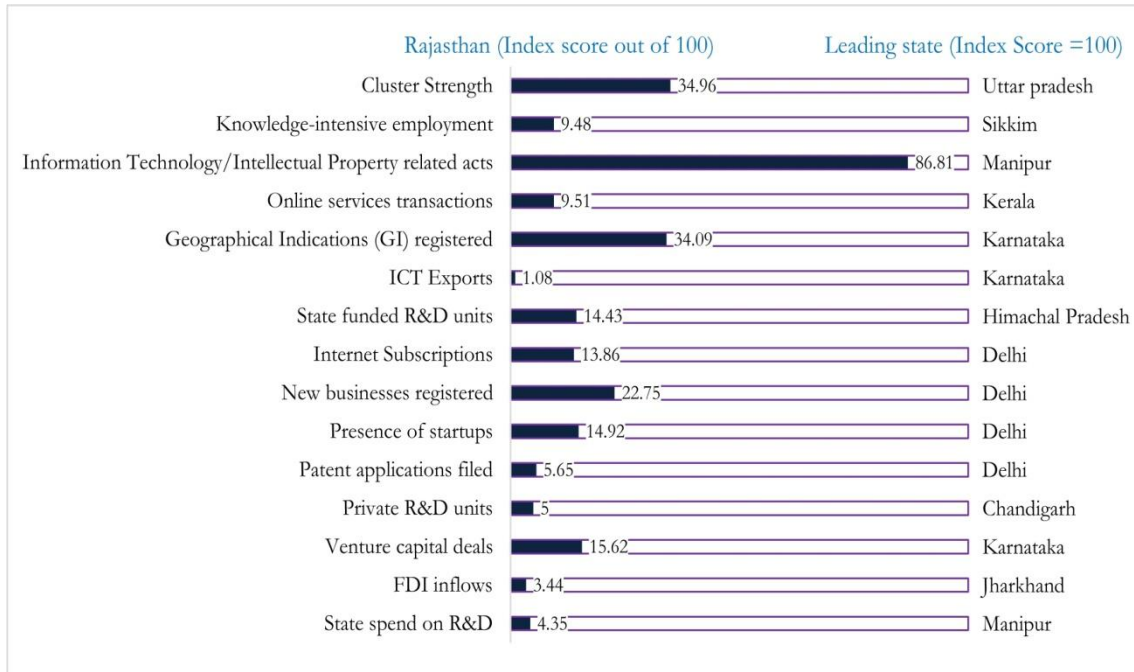
Government initiatives have been critical in unbundling the potential of the state. However, whether such investments have percolated across all regions of the state remains to be seen, especially given that they are culturally diverse. Our assessment of the spatial distribution of ICAs suggests there is considerable scope for tapping in economic activities through localised investment. In this context, the chapter evaluates the landscape of investments into cultural activities in the state, including its contributions and scope for the future.

Investment Environment in Rajasthan

We assess the investment environment of Rajasthan using the parameters identified in the India Innovation Index (NITI Aayog, 2020). It presents a relative depiction of Rajasthan vis-à-vis the other states in the country, which is important given that investment funds are fungible across activities and mobile across borders (Figure 6.1). Notably, the investment environment of Rajasthan presents a mixed picture. On some parameters such as information technology (IT)/intellectual property (IP)-related acts, geographical indication (GI), and cluster strength the state performs decently well. On several others related to information and communication technologies (ICT), research and development (R&D), and knowledge intensity there is considerable scope for the state to improve. Clearly, three priorities emerge for the state to address – investment in human capital, the start-up ecosystem, and boosting R&D.

For these three priorities, while the state has a sizable role to play, a concerted effort from the private sector and the communities is also needed. A ready-made recipe to ensure this coordination for ensuring sustainable growth in investments is elusive, as the investment landscape in the state (as well as in the country) is dynamically evolving. Rather the state should hold periodic consultations with stakeholders to assess the direction and extent of investment needed to crowd in their participation, including a matching reform in statutory norms and regulations. Additionally, macro uncertainties and low inertia in investor sentiments prompt a dynamic evaluation of stakeholders’ role in promoting the investment environment in the state. For example, RBI (2020) suggests

that investment activity falls by roughly two percent after an uncertainty shock, which to some extent may be irreversible.



Source: India Innovation Index, Niti Aayog (2020)

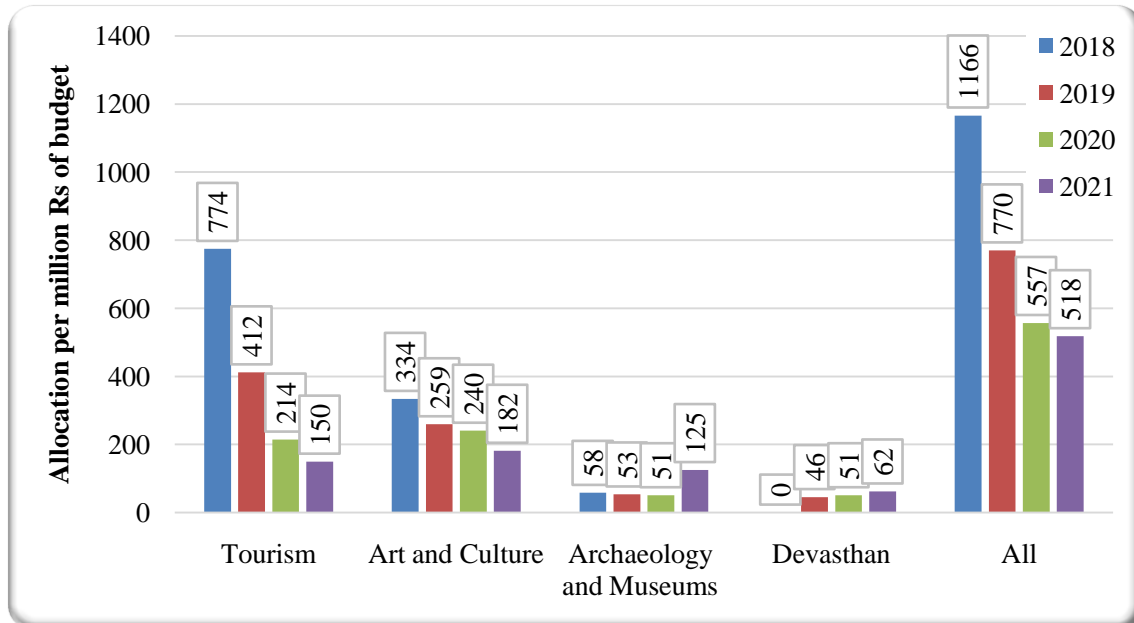
Figure 6.1: Investment Environment in Rajasthan

Government Investment in Cultural Activities

Culture being a collective good, investment infusion into cultural activities falls largely on the state. The private sector's stake is mainly limited to marketability aspects, whereas communities make livelihood-related infusions. Focusing on the state, while almost all infusions influence culture through industrial linkages, the Government's direct influence is mainly through four departments – the Department of Tourism, Department of Art and Culture, Department of Archaeology and Museums, and the Devasthan Department. We examine the Government's direct investment into cultural activities, as budgeted and incurred expenditures, through these four departments on such activities.

Figure 6.2 presents the allocations to these departments in the last four years. We can note that while the Department of Tourism, on an average, accounted for the bulk of allocation, its share has also been falling more prominently. Allocations to the Department of Art and Culture, in contrast, have been falling at a lower rate, and it is the leading Department in terms of allocation in 2021. The Department of Archaeology and Museums received a 1.5 times infusion of allocations in 2021, while the Devasthan Department has witnessed a marginal increase in allocations during 2018-21. Overall, the Government's allocation towards cultural activities is falling. Two points are noteworthy here. First, the fall in the latter two years may be on account of the pandemic shock. Second, to the extent that allocations are capital in nature (as against revenue allocation)

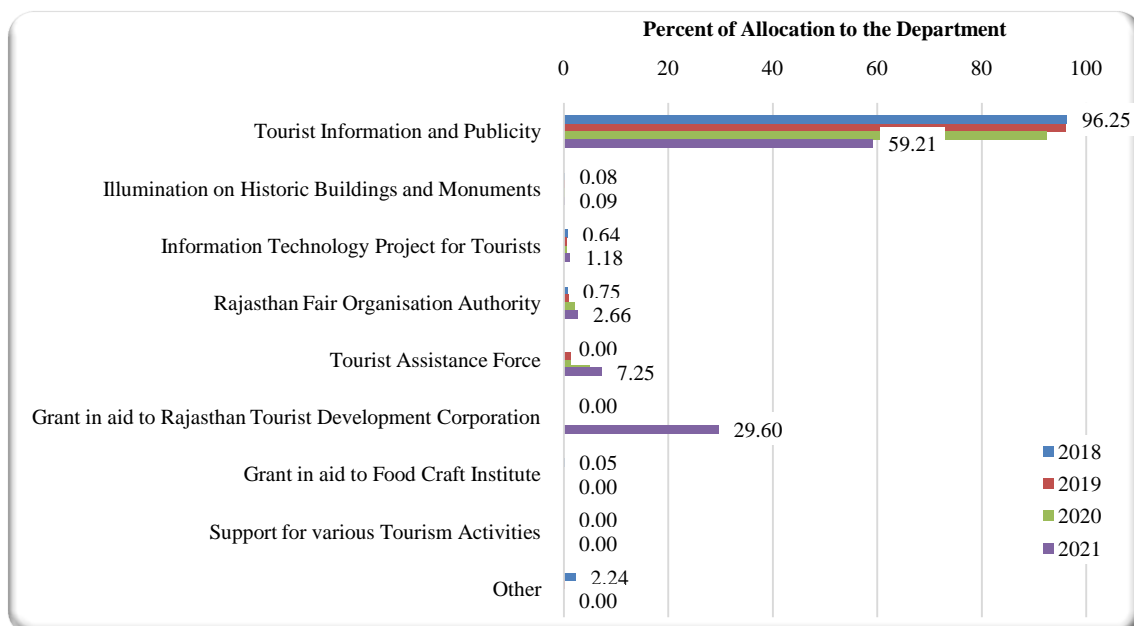
these falls may not be binding, as the created capacity has a cumulative effect over time (i.e., it does not require recurring infusion till it depreciates out).



Source: Finance Department, Government of Rajasthan

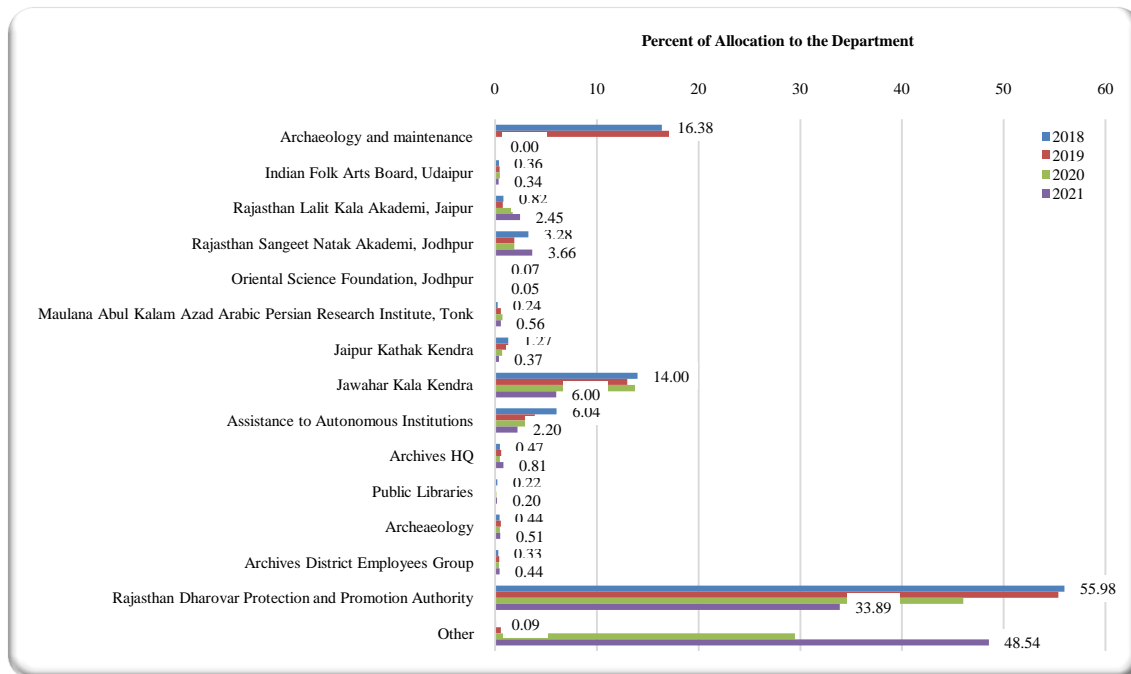
Figure 6.2: Budgetary Allocation to Departments related to Cultural Activities

In order to examine the nature of government infusion into cultural activities, we look further deep into the sub-heads under the Department of Tourism and the Department of Art and Culture. Figures 6.3 and 6.4 present these break-ups, respectively. We find that the pandemic has had the effect of squeezing out government infusions. However, both revenue and capital heads have a fall in allocation.



Source: Finance Department, Government of Rajasthan

Figure 6.3: Budgetary Allocation under Department of Tourism



Source: Finance Department, Government of Rajasthan

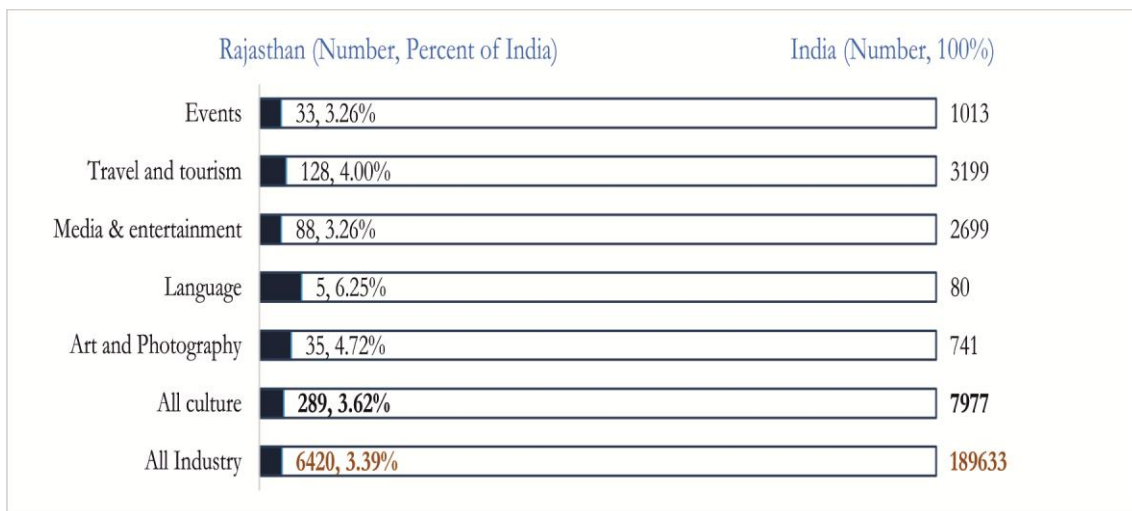
Figure 6.4: Budgetary Allocation under Department of Art and Culture

Figure 6.4, in addition, suggests that government-funded institutions are located only in a few districts/regions, with Jaipur– the state capital– having the most of them. This implies some regional bias, as we noticed in our on-ground survey and stakeholder consultations, in executing/implementing the Government’s policies and expenditure allocations. Overall, we notice that the Government’s direct allocation (investment) towards cultural activities has been falling. But, given that cultural footprints and activities have a sizable inertia, only a sustained fall/low allocation would hurt such activities. Once the economy fully revives from the pandemic shock, which is already becoming evident, large-scale government support may considerably promote cultural activities, including creating opportunities for the private sector and the communities to participate more intensively.

Private Investment into Cultural Activities

To assess private investments into the cultural assets of Rajasthan, we look at the start-ups operating/intending to operate in this segment. These start-ups are likely to have identified concurrent gaps in the cultural landscape of the state, and the corresponding potential to service and monetize it. Thus, a deep dive into the cultural start-up landscape is both warranted and befitting in the current context. Moreover, from a viability standpoint, detailed systematic information on all investments into the cultural segment of the state is unavailable, which makes an assessment of the start-up landscape the best viable alternative.

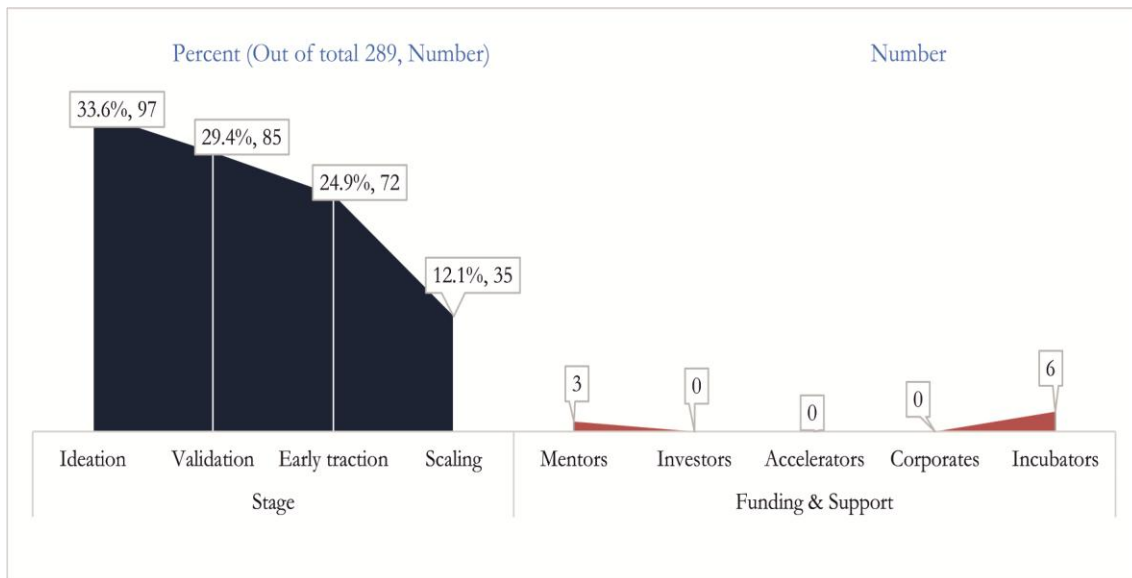
Figure 6.5 presents an overview of the start-ups in cultural activities of Rajasthan, further broken into five segments – events, travel and tourism, media and entertainment, language, and art and photography. We also present the corresponding all-India and all-industry statistics for relative assessment. The figure highlights that Rajasthan’s cultural landscape is more promising for start-ups than all other activities, on aggregate, in the state. Within the cultural spectrum, the greatest number of start-ups focus on travel and tourism, while language-related endeavours attract proportionately more start-ups. However, a major problem for these start-ups is survival through the initial stages of ideation, validation, early traction and scaling.



Source: Startup India portal of the Department for Promotion of Industry and International Trade (DIPP), Government of India. Accessed on February 14, 2022

Figure 6.5: Start-ups into Cultural Activities of Rajasthan

Figure 6.6 presents the number of start-ups at these four stages, and the intra-state plausible funding and support scenario (as mentors, investors, accelerators, corporates, and incubators). Just as these funders and supporters need not invest in Rajasthan’s start-ups alone, Rajasthan’s start-ups may attract funders and supporters from other states or international sources as well. But, even pan-India, the ratio of start-ups to funders and supporters is similar. This implies that there is heightened competition for attracting investments into the cultural (and other) ecosystem. If the Government, even marginally, can tilt this mismatch between investment requisition and potential investors in favour of the state, it may prove to be a considerable boost to private investments in the state. However, doing this necessarily implies providing more incentives to potential investors than other states. An efficient strategy for the Government would be to push more on those investment-related parameters, listed in Figure 6.1, in which it excels. At the same time, it should focus on improving the overall investment environment in the state.



Source: Startup India portal of the Department for Promotion of Industry and International Trade (DIPP), Government of India. Accessed on February 14, 2022

Figure 6.6: Start-ups by Stages and Investors

Case Studies

Capacity Building to Revive Dying Arts

The Shekhawati region of Rajasthan has a rich legacy of a fresco art form unique to the place. Also known as the Green Method of painting because of the use of natural pigments, it is a form of mural painting. It imparts a smooth and glossy finish to the walls, making it a cheaper alternative to marble.

The frescoes mostly depict themes of daily life, religion, rasa-leela and folk mythology. The natural colours bring longevity to the paintings, while the fine craftsmanship has received appreciation from around the world.

Over time, the number of authentic fresco painters and original colours in the region are going extinct. For example, the remnants of original paintings are visible across havelis in Mandawa which play a significant role in attracting foreign visitors to the region. In the process of renovating these havelis, however, artificial colours are used instead of the original fresco painting, compromising the authenticity of this art form. Rejuvenation of the painting's originality will require the procurement of natural colours and the training of artisans. With suitable investments and modern methods of marketing, the restoration may become a profitable prospect, besides adding to the cultural landscape of the state. The following points are worth considering.

1. Fresco painting is an integral part of the cultural heritage of the Shekhawati region. It drives tourists to the region which in turn increases local engagement and aids in the redevelopment of heritage havelis into hotels.
2. Tourists pay a marginal fee to enter and explore the havelis in the region. Once restored, higher fees can be charged.

3. Owing to the significant European influence in the art form, the state government has invited artists from abroad for original paintings in recent years.

Additionally, training and skill development programs can be designed around these renovated havelis. In our on-ground survey, several investors expressed their desire to invest and market this opportunity. However, given that there are about 100 such havelis and landscapes, obtaining a viable scale is a major concern among these potential investors.

Investments in Western Rajasthan to Develop as a Cultural Hub

The Langas and Manganiyars– the desert musicians in west Rajasthan’s Jaisalmer and Barmer districts– play a significant role in tourist arrivals to the region. Due to the unavailability of hotels, tourists stay in Jodhpur or Jaisalmer. If homestays are developed around the villages, tourists will be able to experience the true grandeur of the local art-forms. In addition, tourist accommodations around the hamlets will also increase local economic engagement, through local cuisine, handicrafts and so on. It may also be conducive to set up music schools to integrate with the local cultural expertise of the communities there. For example, the Kamaicha is the core instrument in the Manganiyar musical form, but there are only few Kamaicha players present in Barmer. In order to execute these policies, directed investments are essential, including apt marketing strategies.

Policy Lever

1. The culture-related investment landscape in the state has considerable potential with technology integration. The state has a leading footprint in IT/IP-related acts, GI and cluster strength, which it needs to exploit for attracting investors. At the same time, it needs to focus on pushing ICT adoption, R&D expenditure, and furthering knowledge intensity.
2. There exists intense competition for attracting private investments into the cultural (and other) ecosystem. The Government can tilt this in favour of the state players by incentivizing potential investors more than in other states. This would involve periodic consultations with stakeholders to assess the direction and extent of investment needed to crowd in their participation, including a matching reform in statutory regulations and norms.

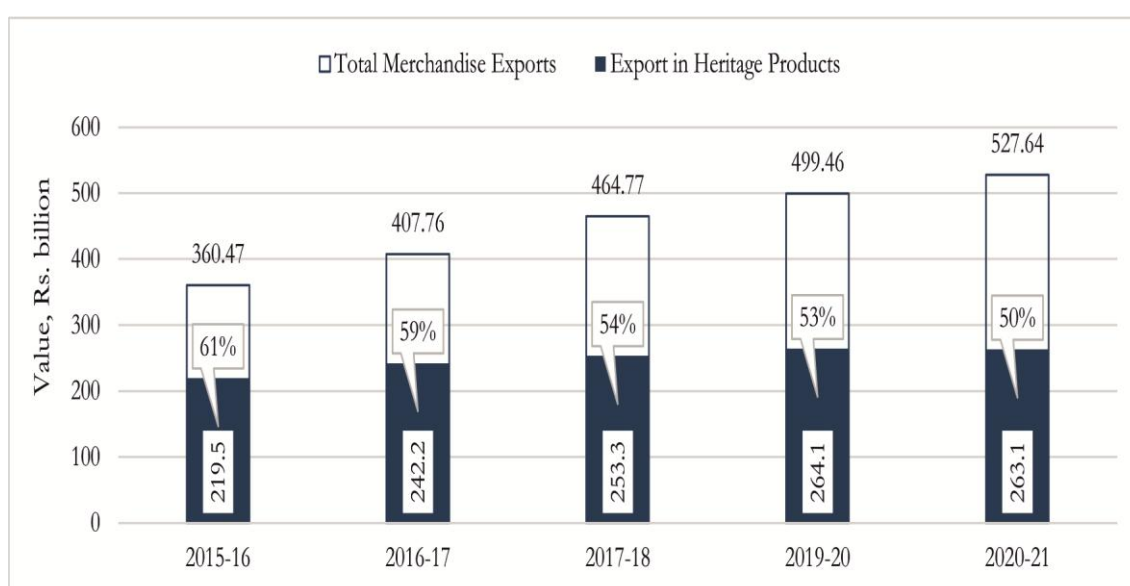
7. EXPORT POTENTIAL

ICAs in Rajasthan, given its cultural diversity and leading position on the world tourism map, are a key segment under service exports. The state offers an array of opulent handicrafts, textiles, gems, jewellery, and stones which occupy a significant share of merchandise exports from Rajasthan. The demand for handicraft products is testimony to the fine craftsmanship which artisans have developed over generations.

Strengthening trade in cultural goods and services provides impetus to local and national markets, which in turn generates employment opportunities and promotes local production. In this regard, the state government, in consonance with the central government, has designed several policies to enhance the export competitiveness of the state. Since Rajasthan is home to generations of artists and artisans who embody its cultural assets, it is important to evaluate the cultural exports landscape in the state.

Export of Heritage Products

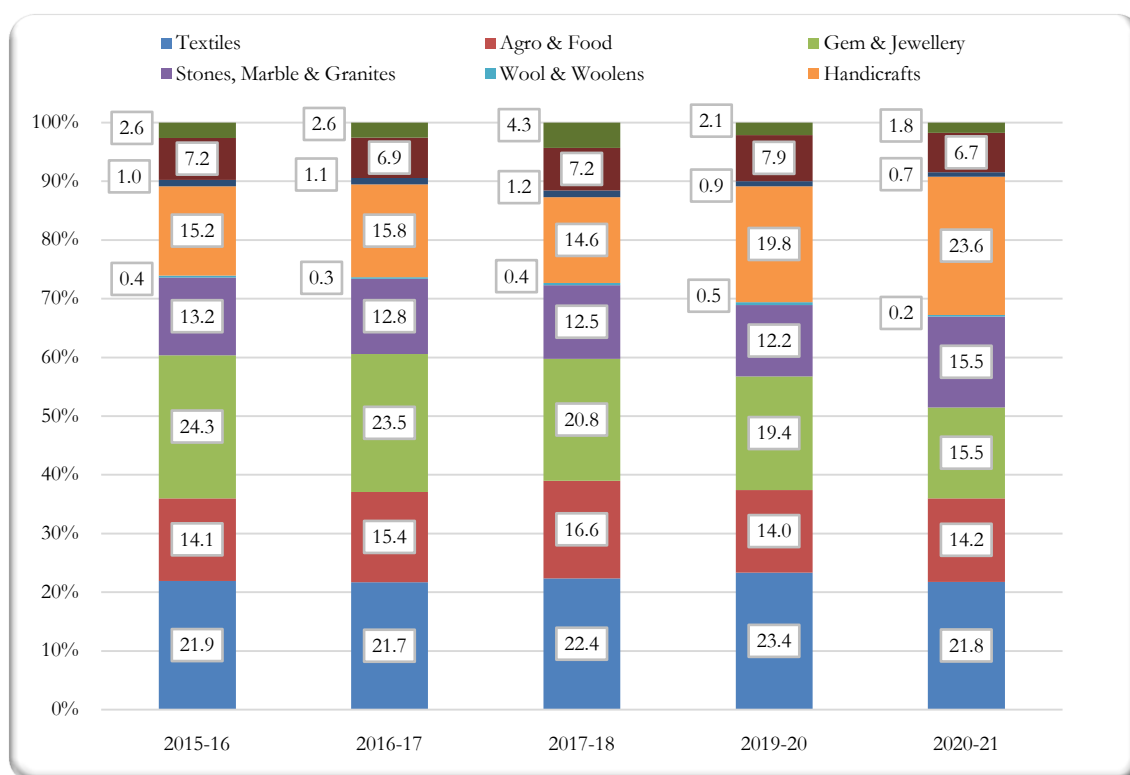
To account for cultural exports from Rajasthan, we divide the total merchandise exports into two groups – technical and cultural/heritage. For instance, industrial products such as engineering goods, ferrous and non-ferrous metals, mineral oils, and fuels are clubbed under technical exports. As against, textiles, handicrafts, food products, ornaments which have a unique geographical index (GI) to the state, are considered as cultural exports or export of heritage products. The data for assessment of both the groups is taken from the Directorate-General of Commercial Intelligence (DGCIS), Jaipur.



Source: Directorate-General of Commercial Intelligence (DGCIS)

Figure 7.1: Merchandise and Heritage Exports from Rajasthan

Figure 7.1 presents the total merchandise exports and export of heritage products from the state from 2015-16 to 2020-21. It indicates an increase in total merchandise exports from Rajasthan at a compounded annual growth rate (CAGR) of 6.56 percent in this period. During the same period, exports in heritage products witnessed a CAGR of only 3.06 percent. That is, there has been a notable decline in the share of heritage products from 61 percent in 2015-16 to 50 percent in 2020-21.



Source: Directorate-General of Commercial Intelligence (DGCIS)

Figure 7.2: Component-wise Heritage Exports from Rajasthan

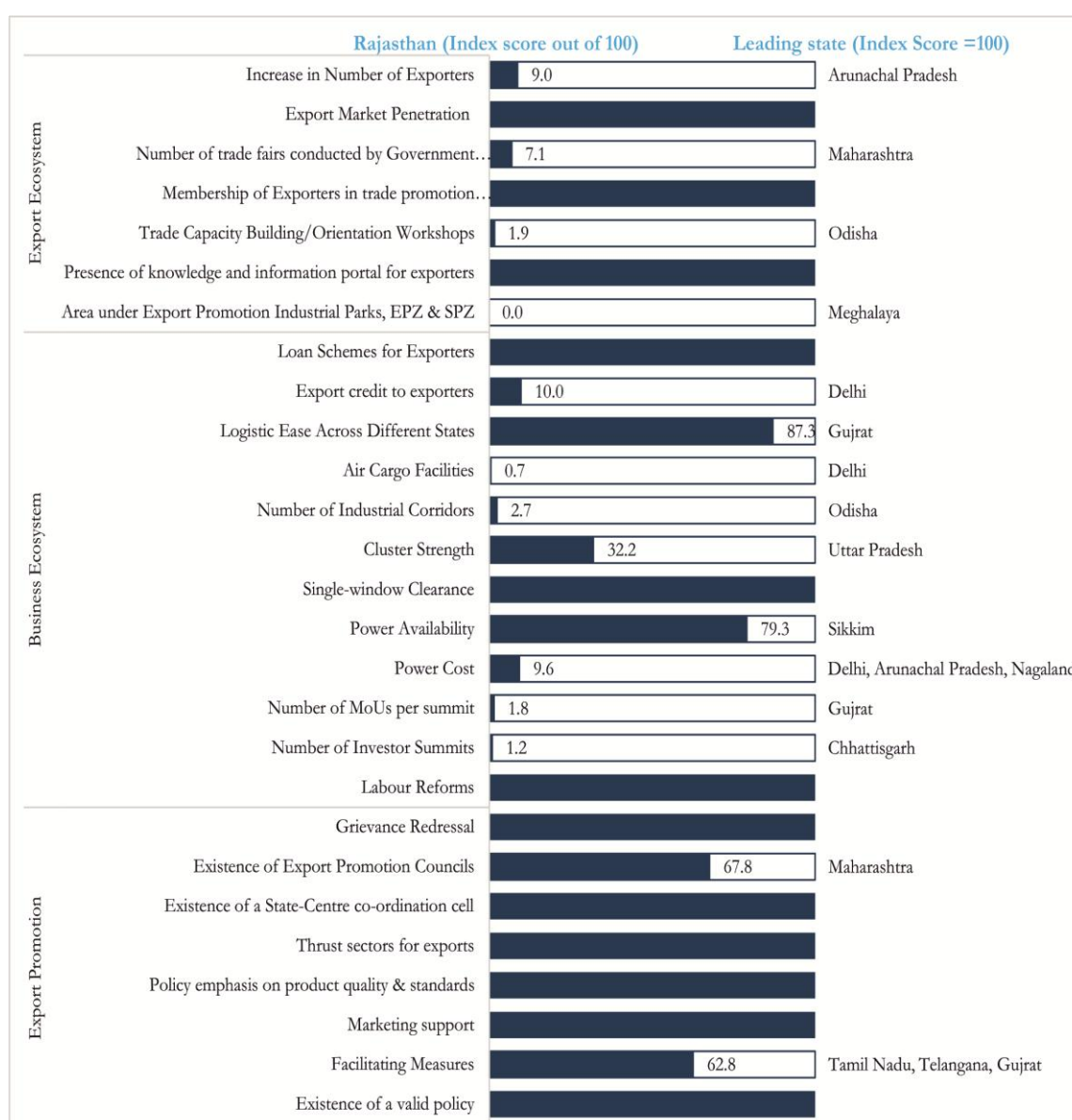
Figure 7.2 presents a component-wise break-up of heritage exports from Rajasthan. Among the components, handicrafts witnessed the highest growth in exports in the past 5 years making it the most prominent component of heritage exports, surpassing the relative share of textiles. The export of stones, marbles and granites follows handicrafts, though its relative share increase is modest. In contrast, gems and jewellery marked the most prominent fall among all heritage products, from 24.3 percent in 2015-16 to 15.5 percent in 2020-21. This fall can be attributed to the US Trade Representative (USTR)'s proposal to impose retaliatory tariffs on 41 Indian products which include gems and jewellery. Notably, the US accounts for 25 percent of the direct shipment of gems and jewellery from Rajasthan (TOI, 2021).

The leading destinations for both, heritage and technical products, from Rajasthan are the UK and the USA. Within the textile and apparel segment, the various forms that have large-scale international demand include Bandhini, Leheriya, Barmeri prints, Jaipuri quilts, Kota Doria and Block Printing (Bagru, Sanganeri). Notably, over

the years Rajasthan textile and apparel artisans have migrated to several states such as Maharashtra, Gujarat, Tamil Nadu, West Bengal and Kerala, contributing to other states for textile production and exports (Rajasthan Textiles and Apparel Policy, 2021). For handicrafts, there are over 500 manufacturing and exporting units in the state, which are located prominently around Jaipur and Jodhpur (MVIRDC, 2016).

Trade Readiness and Barriers

In terms of export readiness, Rajasthan is the leading land-locked state among all Indian states (NITI Aayog, 2020). While the state performs well on several export-related parameters, notable frictions remain for the Government to focus on (Figure 7.3). For example, trade fairs, orienteering of potential exporters, dedicated areas with export focus are noted to have significant impact on pushing exports, which the state lacks in.



Source: Trade Readiness Index, NITI Aayog (2020)

Figure 7.3: Trade Readiness and Barriers

Similarly, Rajasthan also needs to double down on addressing problems related to export credit, limited air cargo facility, and cluster development. These have considerable agglomeration effects, leading to overall improvements in the business ecosystem. Finally, capacity improvement is also requisite for existing export promotion councils and improving trade facilitation.

Additional Export Concerns

There are additional concerns too in the form of tariffs and non-tariff barriers, inter-state dependencies, sovereign support, and standardization. To address these concerns, the state government needs to work in tandem with the central government, especially in pitching voices in trade negotiations with other countries and forming a common ground with other states. We list these below.

1. A common framework for comprehensive quality control, which accounts for local climatic factors, is missing for textile products. This leads to, for example, higher acceptance of Gujarati Bandhej craft than of Rajasthan in downstream markets.
2. The textile industry in Rajasthan is highly dependent on cotton and wool as raw material. It requires horizontal export diversification in the state and with other states (EXIM, 2017). With such an arrangement textile exports from the state (and the country) may become highly competitive with those from China, the global market leader in this segment.
3. Several textile products exported from India to the US face high tariffs. Additionally, this sector faces intense competition with Vietnam and Bangladesh. Gems and jewellery products also face a similar issue. Scaling up marketing and attuning bilateral trade negotiation platforms towards these products may considerably help on this count.
4. The EU, Japan, and the US impose a range of non-tariff barriers on textiles as well as other products in the form of labelling requirements, such as having information about the product size, fibre, etc. It, thus, becomes important to have third-party monitoring for quality assurance.
5. Social compliance is emerging as a prerequisite for buying goods in many countries. Child labour is an issue that plagues several industries in India. For example, the use of child labour in hand-knotted carpets is widely reported and documented. The Government must address this bottleneck in collaboration with NGOs.

Case Studies

Quality Checks to Enhance Acceptability of Local Products in High-End Fashion

Bandhej is a type of tie-and-dye textile which is adorned by plucking the cloth into many bindings that form a design. The fabric is tied tightly and then dipped in for a dye bath. Since the bindings are done manually, there exists considerable variation in the designs on final products. Many families in and around Sikar, in the Shekhawati region, have been practising this art for generations— selling the fabrics to local, national, and international markets. Importantly, Bandhej faces competition from states like Gujarat

and UP in national and global markets. These states score over Rajasthan mainly due to the climatic differences. Rajasthan being dryer, the nature of the fabric is coarse compared to regions like Kachchh in Gujarat.

From a policy standpoint, initiatives can be aimed at marketing the true quality of the product or creating a brand image which will help the product be accepted in a varied form. The following steps can be taken in this regard:

1. The Government can offer technical logistical support to the artisans in collaborating with designers.
2. Given the concentration of artisans in and around Sikar, the Government can formalize a Bandhej cluster, involving local private players.
3. Arrangements can be made for periodic quality checks and quality workshops for greater acceptability in markets and product upgradation, respectively.

Creative Industrial Cluster to Increase Exportability

Most products which fall under the umbrella of traditional craftsmanship of Rajasthan are created in scattered clusters in rural areas. For example, the Pokhran region in Jaisalmer is known as a pottery cluster, Napasar in Bikaner is known for its weaving cluster, Patodi village in Barmer is home to around 200 Jutti makers of the 'Jeenars' community and to Kasidakari embroiders. On the other hand, the markets for these products are usually located in urban centers.

An organized system to efficiently aggregate these art forms from small producers is limited at present. Such a system may considerably lower the costs related to quality checks, inventory management, and transaction costs on account of wholesale and retail supply. The Government, therefore, can dedicate resources, including for mobilizing private investments, for the development of creative industrial clusters. In this regard, the business model of Jaipur Bloc, a cluster of companies supporting sustainable production of handcrafted textiles, can be considered as the best practice.

Policy Lever

1. To push heritage exports, the Government needs to focus on organizing trade fairs, orienting potential exporters, and having dedicated areas with export focus. Additional areas that require government focus are the availability of export credit, air cargo facility, and cluster development.
2. The Government needs to have in place a common framework for comprehensive quality control, which accounts for factors such as climate, nature of fabric and finesse in work.
3. Scaling up marketing and attuning bilateral trade negotiation platforms through the Government of India holds considerable potential to promote exports, especially textiles and gems and jewellery, from the state.

8. INCOME GENERATION

Income is an important measure of economic well-being. It refers to the financial flow in a year through participation in economic activities. At the macro level, Rajasthan ranks seventh in gross state domestic product (GSDP). During 2020-21, the per capita net state domestic product (NSDP) of the state was Rs. 109,386 (at current prices). In the same year, per capita net domestic product (NDP) for India was Rs. 128,829 (Government of Rajasthan, 2020-21). With this backdrop, we examine income generation by ICAs in the state. The key focus is on identifying measures the state can adopt to augment income generation through ICAs. This, in turn, will incentivize communities towards increasing participation in ICAs, and their protection and promotion.

Per Capita Income and ICAs

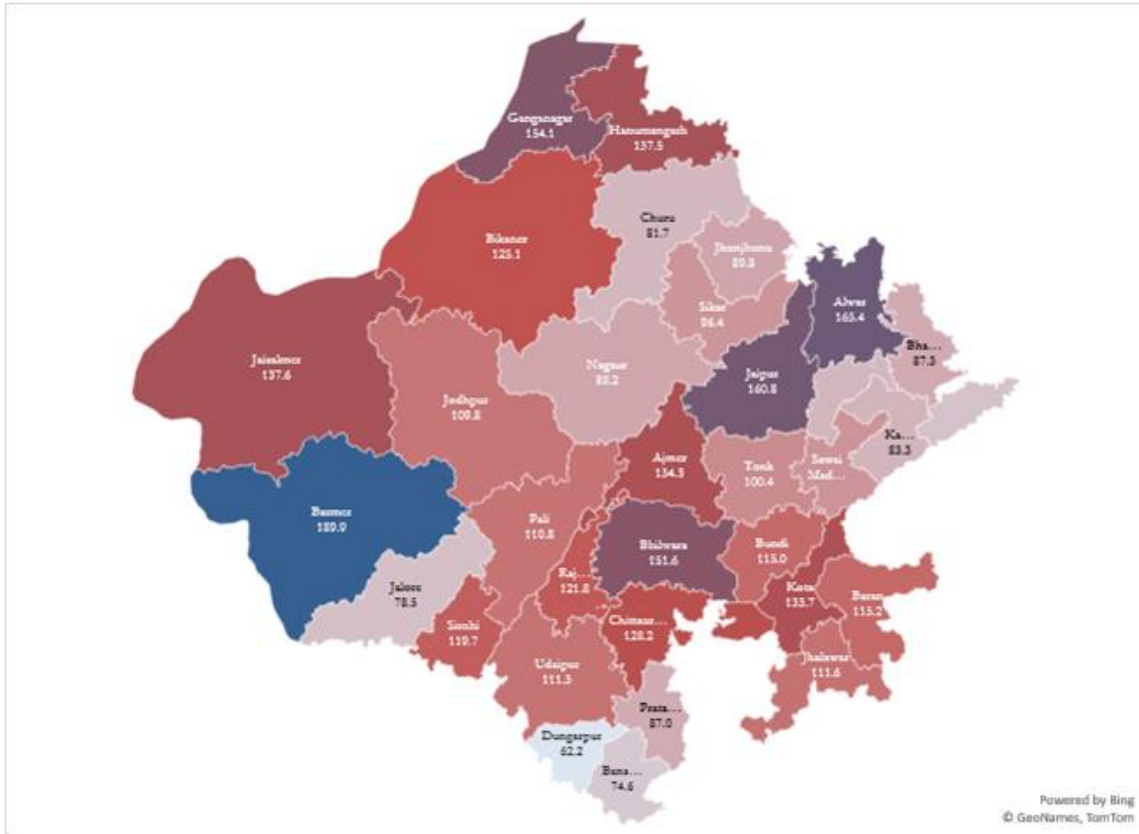
To situate a discussion on income generated due to ICAs, we first look at the per capita income of Rajasthan, in aggregate as well district-wise. Information on pan-state per capita income is obtained from the Rajasthan Economic Review of 2020-21. To construct district-wise per capita income, we obtain estimates of district domestic products from the Directorate of Economics and Statistics of the Government of Rajasthan. Data on population for 2021 is taken from the Census Projections. All computations are for the year 2020-21 at current prices.

Figure 8.1 presents estimates of district-wise per capita income. Barmer emerges as the leading district, followed by Alwar, Jaipur, Sri Ganganagar and Bhilwara. Dungarpur occupies the bottom position, followed by Baswara, Dholpur and Jalore. Overall, the bordering districts have a higher per capita income than the interior.

Subsequently, we look at the income of artists from the surveys conducted by the Jawahar Kala Kendra (JKK) in 2020-21. Notably, even though the sample size for this survey is approximately 4000 (responses in English) only very few (~40) reported their incomes. Thus, the inferences drawn from the income data in the JKK survey are unlikely to be representative at the district levels or for individual ICA elements. Therefore, we compute only state-level estimates from the data.

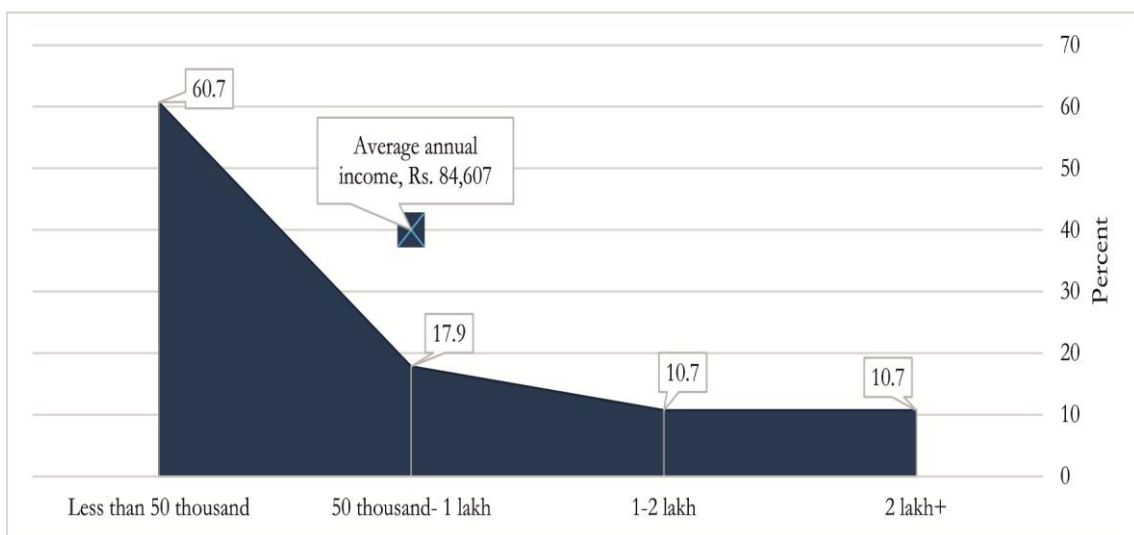
Figure 8.2 presents the income distribution for the artists. The reported average annual income is Rs. 84,607 as against the average annual per capita income in the state at Rs. 109,386. That is, the average annual per capita income of the artists is nearly 23 percent lower than the annual per capita income in the state. Looking further at the distribution of income, nearly 60 percent of artists earn less than Rs. 50,000 annually, while the next 18 percent earn between Rs. 50,000 and Rs. 100,000. Taking a linear projection, it implies that at least 70 percent of the artists earn less than the average annual per capita income of the state. However, the inequality in incomes for artists

seems less extreme than in Rajasthan or India overall, where the top 10 percent income group typically accounts for over 40 percent of wealth. This implies that the incomes of the artists are low, not only on average, but also throughout the distribution (Oxfam India Inequality Report, 2021).



Notes: Income is in 2020-21 prices. Source: Directorate of Economics and Statistics of the Government of Rajasthan, Census Projections

Figure 8.1: District-wise Per Capita Income (Annual, Rs. '000)

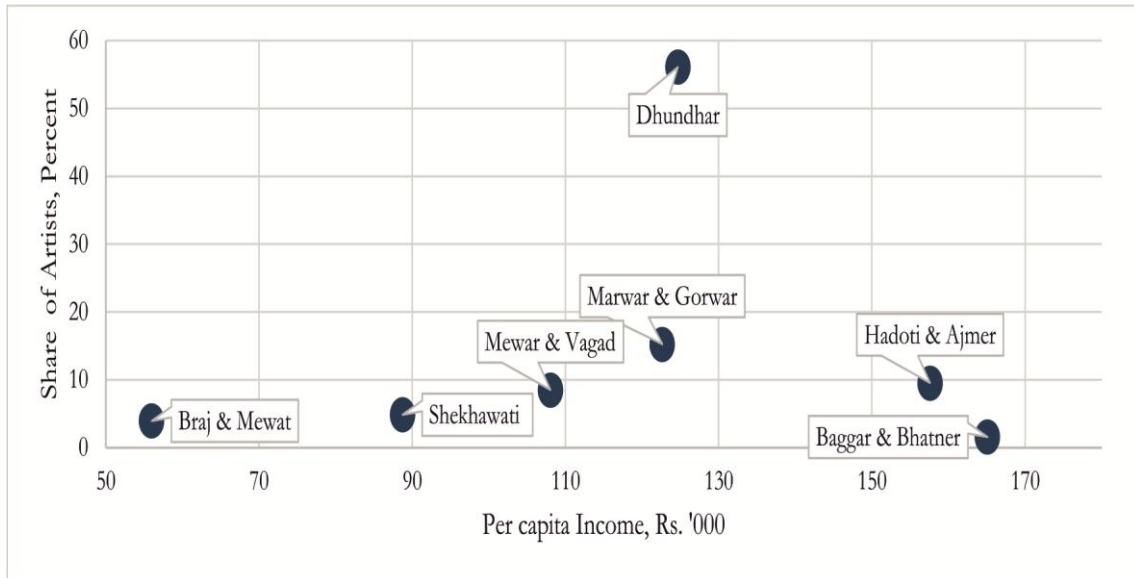


Note: Income is in 2020 prices. Source: Jawahar Kala Kendra (2020-21)

Figure 8.2: Income Distribution of Artists

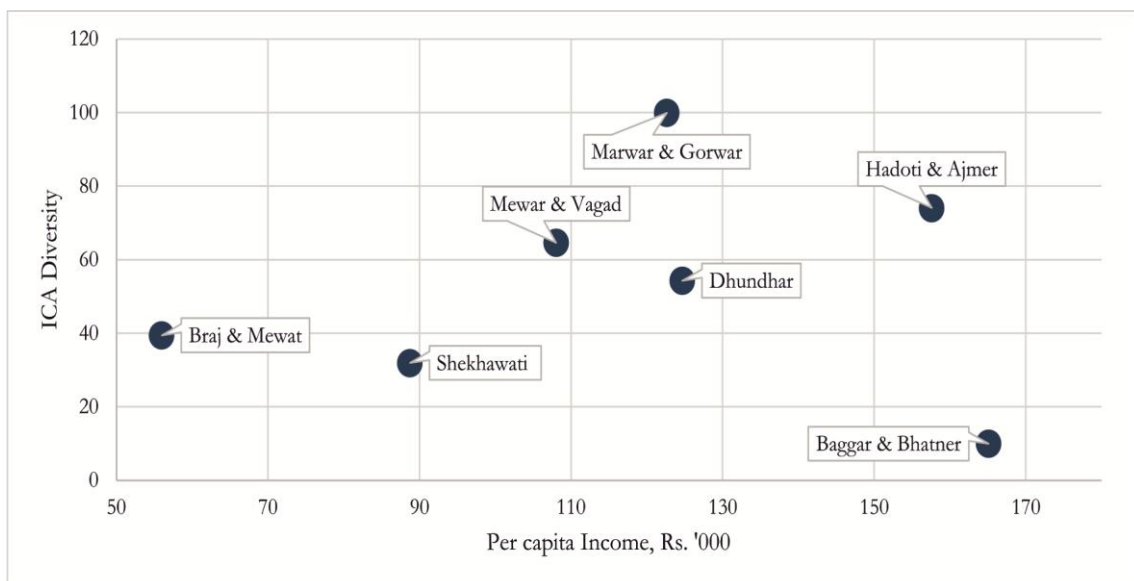
Per Capita Income, Participation in Art Forms, ICA Diversity and Tourist Footfall

We assess if incomes have an association with participation in art forms, ICA diversity and tourist footfall using the regional distribution of these parameters. Figures 8.3-8.5 present the scatterplots. We notice positive associations in all three cases. However, income has the strongest association with ICA diversity, while its association with participation in art forms and tourist footfall is low. This suggests that preserving and promoting all ICA forms, rather than only those with high market appeal, is important.



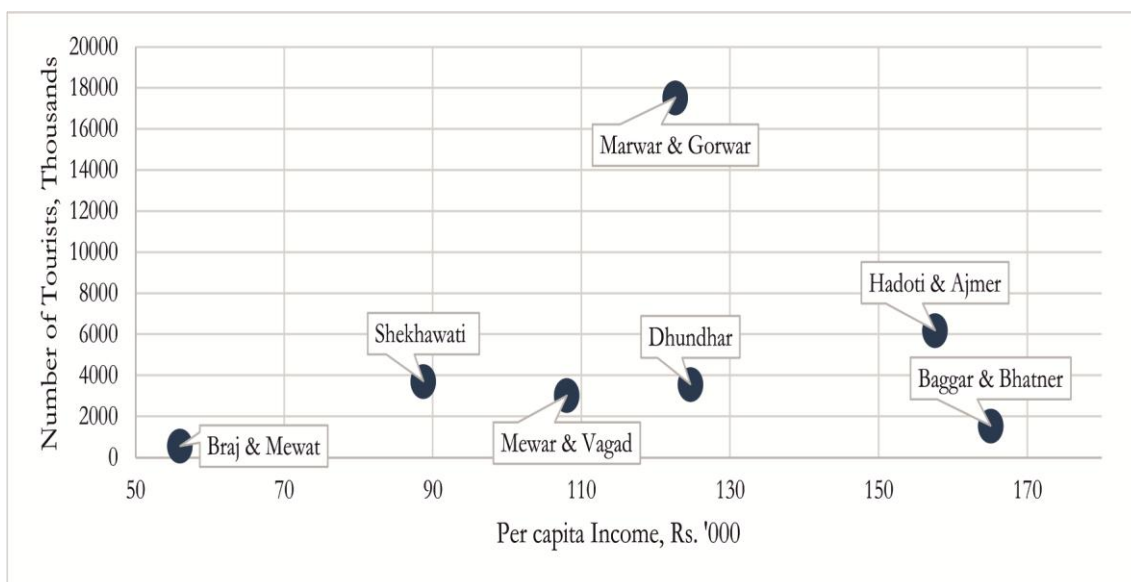
Source: Directorate of Economics and Statistics of the Government of Rajasthan, Census, Jawahar Kala Kendra (2020-21)

Figure 8.3: Per Capita Income and Participation in Art Forms



Source: Directorate of Economics and Statistics of the Government of Rajasthan, Census, On-ground Survey, Stakeholder consultations

Figure 8.4: Per Capita Income and ICA Diversity



Source: Directorate of Economics and Statistics of the Government of Rajasthan, Department of Tourism of the Government of Rajasthan, Census

Figure 8.5: Per Capita Income and Tourist Footfall

Case Studies

Safety Net for Artists and Artisans Practicing Local Art Forms

Safety nets refer to policies put in place to help the vulnerable sections mitigate their livelihood risks. In Rajasthan these benefits are offered at three levels. First, funds are allocated to a selected group of artists through scholarships. Second, some organizations, like the Bharatiya Lok Kala Mandal in Udaipur, engage selected artists as salaried employees. Third, some social businesses, like Anokhi Jaipur, offer safety nets in financial terms besides investments in skill development. All three, in aggregate, provide for a small fraction of artists and artisans in need of social safety.

Artisans and artists, who are solely dependent on their trade for sustenance, typically face twin problems in self-provisioning of livelihood safety, as we observed in our on-ground consultations. First, they often lack basic financial literacy which leads to minimum saving and investment plans for the future. Second, to a considerable extent, they face a seasonal livelihood risk. They fail to earn enough during peak seasons due to high competition. For example, in this season, there is a heavy influx of cross-state artists. In contrast, during the lean season, artists do not have enough opportunities to showcase or perform.

From a policy standpoint, it is therefore important to design schemes aimed at improving livelihood security for practitioners. This may include, training for planned spending and saving habits, availability of concessional credit, and insurance against seasonal livelihood risk.

Cultural Villages: Organization and Institutionalization of Cultural Centres

Jodhpur, like several other locations in the state, is a hub of traditional Kalbelia dancers. Such spatial concentration of artists creates an opportunity for tourists to have a unique experience. Its smooth execution requires extensive tourist facilities, including quality accommodation, trained guides and transportation services. For instance, through the declaration of Special Tourism Zones, the state opened new destinations and created awareness about the benefits of tourism. Extending such an arrangement towards community-specific development will have economies of scale. This holds enormous livelihood opportunities, hitherto uncaptured.

Policy Lever

1. The Government, in order to address the core problems of ICA practitioners, needs to design schemes aimed at improving livelihood security. This may include training for planned spending and saving habits, extending concessional credit, and insurance against seasonal livelihood risk.
2. The income path of ICA practitioners is significantly entwined with diversity in ICAs, even more than with tourist footfall or the number of artists associated with a region. Thus, diversity in ICAs needs more focus than other strategies for the preservation and promotion of culture in Rajasthan.
3. The Government should commission a dedicated study on the income dimension of ICAs, as it is the most critical parameter from the livelihood side.

9. LAWS AND POLICIES

Rajasthan is endowed with multiple traditional cultural forms. Each of these forms demonstrates notable development in its illustrious history, and has considerable bearing on the contemporary economic lives of individuals and communities. For example, cultural heritage is a driver of tourism and acts as a segue to livelihood in the state. Thus, it becomes imperative that these cultural forms and their corresponding superstructures are economically efficient, inclusive and evolving. Laws and policies for the protection, preservation and promotion of cultural assets in the state, therefore, take a front seat in meeting these objectives.

While there exist several laws and policies for the protection, preservation and promotion of cultural assets in the state, a systematic review of these laws and policies is missing. It is important to address this gap for two primary reasons. First, with evolving time the (aesthetic and) economic importance of these cultural assets is also evolving, which invariably leads to newer frictions and opportunities. For example, while the pandemic had a binding downside effect on tourist footfall in the state, it presented an opportunity to explore digital platforms as a means to promote cultural assets in Rajasthan. Second, there are several elements to making a law or policy fully or partially effective that includes, for example, its objective, awareness, implementation and subjects' participation. An assessment of whether and to what extent one or more of these elements are on course, gives an all-important direction for a corrective mechanism to be put in place. With this backdrop, the following section presents an approach for evaluating laws and policies for the protection, preservation and promotion of cultural assets from an economic standpoint.

Approach for Evaluating Laws and Policies

Figure 9.1 discusses our approach to evaluating laws and policies from an economic standpoint. At the outset, all laws and policies are seen through the lens of three rationales, viz 'efficiency' in meeting the intended objective, 'inclusiveness' for the masses and 'evolving' to accommodate the changing scope of economic activities. While these rationales serve as the gold standard, they are unobservable. Therefore, we further break them up into four parameters that can be assessed through subjective evaluations.

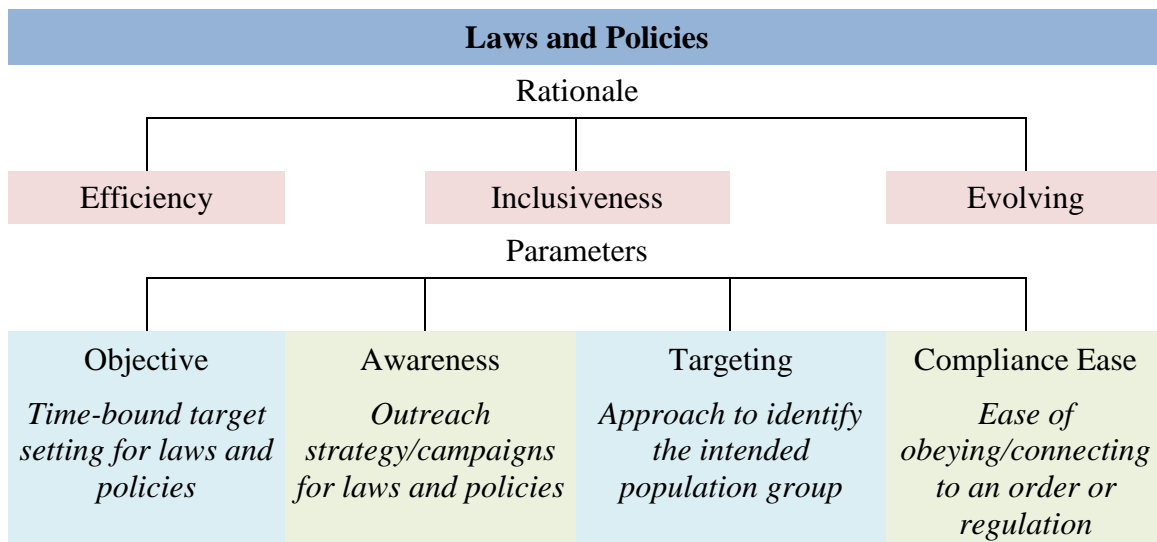


Figure 9.1: Approach for Evaluating Laws and Policies from an Economic Standpoint

List of Laws and Policies and their Evaluation

For evaluation we include a list of laws and policies related to the cultural assets in Rajasthan, and catering to the subjects listed in Table 9.1.

Table 9.1: Subject-list for Evaluation of Laws and Policies Related to Cultural Assets

Government run infrastructure, including museums, protected monuments, memorials
Government supported institutions, including academies
Marketing
Engagement with the international community
Government organized and/or supported events
State Tourism Policy 2020
Other initiatives and campaigns

Table 3 presents an assessment on the Likert scale, with zero indicating the minimum score and five indicating the maximum. The assigned scores are based on stakeholder consultations, on-ground survey, policy and regulatory texts, and secondary literature on the cultural assets of Rajasthan.⁴ Three key inferences emerge.

1. As a normative goal, the state should focus on having at least an 80 percent score for a considerably efficient, inclusive and evolving law and policy superstructure. This requires a considerable push by the state machinery on all parameters.

⁴ The list of stakeholders and geographical coverage for the on-ground survey is limited. Therefore, the assessment based on the Likert scores is, at best, directional, and can be refined with greater coverage of stakeholders and geographies in the state.

2. On the whole, policy-making around cultural assets in the state needs more focus on compliance ease, as it is the most lagging parameter.
3. There is notable variation in the scores for laws and policies originating or being implemented by different organs of the Government, suggesting that inter-departmental synergies can also be further explored to improve their effectiveness and inclusiveness.

Case Studies

Udaipur: Geographical Landscape-based Policy Support

Udaipur or the City of Lakes is a prime tourist destination in Rajasthan. It witnesses an influx of cross-state and international tourists for weddings and from neighbouring states like Gujarat for recreation. Besides, it is the gateway with air connectivity to reach other popular destinations in the region such as Chittorgarh and Mount Abu.

Table 9.2: Assessment of Laws and Policies related to Cultural Assets of Rajasthan

Law/Policy	Parameters				Score, out of 20	Score, percent
	Awareness	Objective	Compliance Ease	Targeting		
Devasthan Department related rules and regulations	3.5	3.5	3.3	3.7	14.0	70.0
Grant in Aid Rules, 1958	3	4	4	4	15	75
Fund Service Rules, 1959	4	3	4	3	14	70
Public Trust Act, 1959	4	3	3	4	14	70
Public Trust Rules, 1962	3	4	3	3	13	65
Devasthan State & Subordinate Service Rules, 2000	3	3	3	4	13	65
Grant in Aid to Temples & Other Religious & Charitable Institutions Rules, 2010	4	4	3	4	15	75
Government of India rules and regulations	3.8	3.5	3.5	3.5	14.3	71.3
The Religious Endowments Act, 1863	4	4	3	3	14	70

Law/Policy	Parameters				Score, out of 20	Score, percent
	Awareness	Objective	Compliance Ease	Targeting		
The Charitable Endowments Act, 1890	3	3	3	3	12	60
The Indian Trusts Act, 1882	4	3	4	4	15	75
The Charitable & Religious Trusts Act, 1920	4	4	4	4	16	80
Various schemes under the Devasthan Department	3.7	3.7	3.0	3.0	14.3	71.7
Kailash Mansarovar Teerth Yatra scheme	4	4	3	3	14	70
Sindhu Darshan Teerth Yatra Scheme	3	3	3	3	15	75
Senior Citizens' Teerth Yatra Scheme	4	4	3	3	14	70
Tourism Department related rules and regulations	3.6	3.5	3.4	3.6	14.1	70.4
Rajasthan Tourism Trade (Facilitation & Regulation) Act & Rules 2010	3	4	3	3	13	65
Ropeways Act, 1996 & Rule, 2000	3	4	3	3	13	65
Disposal of Land & Properties by DoT/RTDC Rules, 1997	3	3	3	3	12	60
Rajasthan Tourism Grant in Aid Rules, 1998	3	3	3	3	12	60
Film Shooting Amendment Regulations, 2016	4	4	3	3	14	70
Tourist Assistance Force Regulations, 2013	3	3	3	3	12	60

Law/Policy	Parameters				Score, out of 20	Score, percent
	Awareness	Objective	Compliance Ease	Targeting		
Paying Guest Accommodation Scheme & Rules, 2021	5	4	5	5	19	95
Tourism Information & Publicity Rules, 1975	4	3	3	4	14	70
Scheme for Reduction in Stamp Duty for Heritage Hotels, 2013	4	3	3	4	14	70
Rajasthan Tourism Unit Project Appraisal Guideline, 2009	4	4	3	4	15	75
Recognition of the Travel Agency/Excursion Agency/Safari Operators, 1996	4	4	3	4	15	75
Guidelines for granting certificate of heritage to operating heritage hotels/properties, 2016	3	3	3	3	12	60
Rajasthan Tourism Unit Policy, 2015	4	4	4	4	16	80
Rajasthan Tourism Policy, 2020	4	3	5	4	16	80
Art & Culture Department related rules & regulations	4.5	4.0	4.0	4.5	17.0	85.0
Grant-in-aid Rules, 1985	4	4	4	4	16	80
Grant-in-aid Rules, Rajasthani-Films, 2015	5	4	4	5	18	90
All laws & policy	3.8	3.6	3.4	3.6	14.7	73.7

Note: Scores are based on the Likert scale, with zero indicating the minimum score and five indicating the maximum. The assignment of scores is based on stakeholder consultations, on-ground survey, policy and regulatory texts, and secondary literature on cultural assets of Rajasthan.

The old city in Udaipur (around Lake Pichola, Fateh Sagar Lake, Swaroop Sagar Lake, Rang Sagar Lake, Kumharia Talab and Goverdhan Sagar) attracts the greatest number of tourists. It has narrow lanes, lined with stores selling handicrafts and

merchandise. While it offers an opportunity for local businesses to engage with tourists, the congested roads also have a negative impact on the tourism value of the place. Specifically, these narrow lanes entail a significant cost in commute time and money spent. For instance, to travel a kilometer in the old city on an auto-rickshaw, it takes about 25 minutes and INR 100-150.

While the city is endowed with lakes, with establishments such as hotels, event sites and temples mostly located around Lake Pichola, waterways as a mode of transportation can be strengthened. As of now (2021) only four hotels have permits to ferry boats in the lake. The Government should consider the following workable approach to make Udaipur a more pleasurable and economically efficient destination by using waterways.

1. The Government may issue more permits for ferry service in the lakes.
2. Congestion may offset the appeal of waterways. So, as a pilot, 25 boats per lake can be allowed for a year. During the pilot, 15 boats may be allowed during peak hours (3PM-12AM) and 10 boats can be allowed during normal hours (6AM-3PM).
3. Permit awards can be based on an auction. This may generate sizable state revenue. Permits for the number of boats in the lakes can be reviewed annually.

This policy support would attract tourists to local businesses, generate local employment, add value to the establishments which surround the lakes, and will be a source of revenue for the State Government. During the on-ground survey, we noticed sizable stakeholder support for this policy arrangement.

Havelis: Policy Support for Unique Cultural Sites to Transform as Cultural Hubs

Rajasthan is endowed with a wealth of havelis that reflect the unique culture and architecture of the state. This landscape is a key driver of tourism, marriage destination choice and a preferred location for a large number of film shoots. This leads to generation of employment opportunities in all backward and forward linked industries: into tourism, food, logistics sectors, and for sellers of locally made products for domestic and international consumption. However, a large number of havelis in Rajasthan are on the verge of ruin. Two prime reasons are the cause. First, many havelis have a large number of owners (as the descendants of erstwhile kings) who have migrated to other parts of the country or abroad. This lack of ownership control has eased their encroachment, and their transformation into shops and stalls. Second, the age-old havelis need their authentic style restored to remain a cultural symbol, which for example, has remnants of arish and fresco paintings. However, it is difficult to get renovators who specialise in such arts because the number of such artists has declined, and those who remain find the scale of work (when prompted individually by a haveli owner) economically unviable.

The Government should consider the following to transform these havelis into cultural hubs.

1. Declare all havelis as cultural heritage. This implies that altering their authentic state will be a punishable offence.
2. Prompt haveli owners to reorient their holding as a seat of cultural learning. For this, a speedy single-window regulatory clearance mechanism can be put in place.
3. Incentivise several haveli owners (through fiscal means) to come together to create a cultural hub. This may, for example, involve training in a number of dance, music and local handicraft forms.
4. Encourage haveli owners to act as patrons of cultural forms, especially those for which the number of experts/artists is on the decline.
5. Set up a partnership mechanism with migrant haveli owners, where on a sharing basis the state can manage the havelis.
6. Use technological advances such as geo-tagging and satellite imagery to keep a track on havelis.

Policy Lever

1. Policy-making around cultural assets in the state needs more focus on compliance ease. This implies there is a need for making rules and regulations simpler and less time-intensive.
2. The Government should work towards improving inter-departmental synergies to increase the overall effectiveness and inclusiveness of rules and regulations for cultural assets.
3. The Government needs to be proactive in regulatory reforms to tap unutilized resources in the state. Regulated waterways in Udaipur and havelis in most parts of Rajasthan present the most considerable opportunities.

10. GRASSROOT VOICES

During the field survey, we held focused discussions with several stakeholders. They included representatives from cultural institutions, musicians, artists, craftsmen, event organisers, hoteliers, administrators/caretakers of museums and monuments, government officials in the tourism and cultural departments, shop-keepers dealing in local genuinity, and culture researchers. Several suggestions emerged from these stakeholders for promoting culture from an economic standpoint. A summary of these suggestions is listed in Table 10.1. We present a brief discussion of the salient points below.

Table 10.1: Summary of Grassroot Voices and Requisite Intervention

	Government Support			Private (Individual/ Institution) Patronage	Community support
	Financial	Regulatory	Technical		
Price setting for cultural artifacts			√		
Animal Economy: Horse & Camel		√		√	
Use of Digital Medium for marketing/advertising	√	√		√	
Preservation of Monuments and Havelis	√	√		√	√
Organizational make-over of prominent cities		√		√	√
Cultural Cluster Development		√		√	
Improving capacity of existing Institutions	√	√	√		
Institutional information interoperability		√			
Information acquisition	√	√			√
Local Handicraft certification/standardization		√			
Cross-district (adjoining state) linkage promotion	√	√			

Note: The table presents suggestions from stakeholders during a field survey conducted in November 2021

Price Setting for Cultural Artifacts

Rajasthan hosts several music festivals throughout the year. While some bring together Rajasthani folk tunes from various districts, others celebrate the unique confluence of contemporary culture with Rajasthani heritage and hospitality. The latter includes the Magnetic Fields Festival of Alsisar and the Taalbelia Festival of Mandawa in the Shekhawati region among others. Along with music, festivals offer tourists a chance to engage in various workshops that teach the local art forms, sand surfing, dirt biking and other activities. The total cost of attending such festivals ranges from Rs. 25,000 to Rs. 50,000, including tickets, accommodation, and other services. In contrast, ticket prices for festivals celebrating Rajasthani music are relatively low. For example, tickets for the musical evenings hosted in Ambrai, Udaipur cost Rs. 150 approximately. This highlights a disparity in the pricing of events. In this regard, standardisation of prices may potentially increase the number of national and international tourists in and around the festival destination.

- These festivals foster local engagement and create a platform for local artists to engage with a global audience. The exorbitant ticket prices often impede the ability of national tourists to experience such festivals. Technical assistance from the Government is important in this regard. This entails setting up a group of skilled professionals who can conduct an in-depth analysis of costs and benefits and set accurate prices for such cultural artifacts.

Animal Economy

Camel and horse safaris are a part of cultural life in Rajasthan. While camel safaris are prominent in Jaisalmer, Bikaner, Pushkar and Jodhpur, horse safaris attract tourists to the Shekhawati region. Annually hundreds of foreign tourists visit Rajasthan for these experiences. These safaris allow tourists to witness the picturesque countryside of Rajasthan in a unique adventurous style. Such activities, in addition, promote the economic engagement of locals in all linked activities as artisans, traditional folk artists, tour guides, and suppliers of logistical services and food.

- The terrain offers opportunities to organize local fairs and global events such as Sunset Camel Safari, Gallops of India, which invite riders from around the world. These can be scaled up with international promotions.
- Attraction for such safaris and events is contingent on preserving the unique trails and terrain, and plant and animal life indigenous to the region. Regulatory will and support is necessary to prescribe dedicated corridors for such activities, and to keep developmental disruptions that alter these landscapes at bay.

Use of Digital Medium for Marketing/Advertising

Rajasthan is home to hundreds of folk artists, specializing in dozens of art forms. Organizations such as the Jaipur Kala Kendra, Jaipur Virasat Foundation, Bagore ki Haveli, and Bharatiya Lok Kala Mandal host several exhibitions and events that allow visitors to explore the many folk music cultures of Rajasthan. However, these

organisations have inadequate outreach capacity. As a result, cross-state and international footfall is limited for these events.

- The popularity of social media platforms such as Instagram, YouTube and Facebook can be leveraged to advertise such performances. This would entail sizable technical support and low-scale financial support from the Government in identifying relevant networks and locations for scaling up the audience size.
- As an advertisement strategy, district-specific tourism festivals and campaigns can be organised at prime tourist locations. It can be a 2- or 3-day event with handicraft stalls, performances and local cuisines to celebrate the cultural heritage of the region. Flyers with detailed information about local accommodation and activities such as heritage walks, overnight camps and safaris will be distributed among visitors. The organisation would require government-private collaboration. This entails technical and logistical support from event organisers and culture-led institutions with overall monitoring by the Government. Media houses can be invited to cover the events and attract sponsorships in the process.

Preservation of Monuments and Havelis

Rajasthan is home to hundreds of monuments and havelis that display remnants of traditional art and craft (such as fresco and arish work). Such architectural structures attract tourists from across the world. This in turn increases the engagement of the local communities. Engagements range from tour guides to the potential of a marketplace for local crafts such as Bandhej work.

- The preservation of monuments and havelis is imperative to generate employment and create wealth in the local economy. While there exist state-level policies for the preservation of havelis, technical support from the Government and private organisations will further strengthen the framework. This could be in the form of third-party monitoring and geo-tagging.⁵
- Regulatory support from the Government in collaboration with international organisations should be encouraged towards the declaration of heritage sites. This entails assistance in designing heritage management strategies, skill development training and workshops for artisans, community awareness and involving the local government set-up in periodic monitoring. In addition, partnership with organisations that work on design, architecture, planning and management are required for capacity building programs and preparation of heritage management plans.
- It is also important to establish a common goal among members of the community about the vision for the region, with monuments and havelis as the center of economic activity. Inviting private investments and awarding patronage may be of considerable help in this regard. The spread of community awareness

⁵ The data consists of latitude and longitude coordinates which can then be used to identify the geo-tagged item and monitor it through satellites. The mapping of structures will aid in close monitoring of the havelis and allow tourists to identify the locations.

of the potential benefits to be accrued should be encouraged. For example, the traditional Chippa community of Sanganer, once emerged as a prominent economy under the patronage of the Jaipur royal family. Today, there is significant intervention by designers attempting a revitalization of traditional motifs and the integration in the upscale fashion industry (World Bank, 2018).

Organizational Makeover of Prominent Cities

Rajasthan boasts a rich ensemble of heritage based creative economies ranging from textiles and block printing in Jaipur to stone carving in the Udaipur district. This variation attracts tourists from around the world. The main tourist flow is through Jaipur, Ajmer, Jodhpur, Udaipur and Bikaner among others. Observations from secondary literature and on-ground consultation indicate the scope for organisational improvement in these regions. This includes strengthening inter- and intra-regional connectivity, and periodic documentation of all cultural events hosted by the city and neighbouring towns. Such initiatives will potentially increase the flow of tourists and improve local engagement in and around the prominent cities.

- The overall landscape of the old city of Udaipur adds to its charm. However, commuting through the narrow lanes is time-consuming and cost-ineffective. In this regard, the initiation of a ferry-based connectivity system will add to the experience for tourists. Since there are establishments around each lake, regulatory support can help in selecting license holders for such services. Public-private partnerships in this regard are important to bear the initial development costs for this project.
- There are several destinations in Rajasthan such as Phalodi and Nagaur that do not fall on the typical tourist routes but are rich in architectural heritage. This indicates a potential to integrate them into a wider tourist network. To attract tourists to the less-visited destinations, regulatory support from the Government is required to strengthen connectivity by road, rail and air along with the development of regional circuits and corridors with nodal towns; and technical assistance will be required from private entities and tour operators. For instance, the Rajasthan International Folk Festival in Jodhpur is supported by the Mehrangarh Trust. Such festivals may be expanded to smaller towns in the region. In addition, active community involvement should be encouraged for the smooth integration of smaller villages into tourist circuits.

Cultural Cluster Development

In Rajasthan, each region is characterized by several specific art forms. Cultural and creative industry clusters can help expand the urban and economic development of every region. For instance, the characteristics of a region turned into a cultural hub may include a center for manufacturing work in traditional crafts, or a center to foster traditional music and dance forms. Such agglomerations will preserve the architectural structures of the region, create employment opportunities for local communities, and

form market linkages with surrounding towns and cities. In addition, collectively these factors will increase the tourism value of the region.

- In a few districts, the craft that is locally practised is not being promoted through cluster programs. Considerable support from private entities is required to study the functionality of the cluster, the scope of integration of the art-form and the potential impact on employment and livelihood. To foster the development of such clusters, national and international organisations could be invited with the scope of creating global exposure for these local crafts. This, in turn, will potentially lead to the formation of direct market linkages between artisans.
- Revenue generation model through Private-Public-Partnership Schemes should be adopted. This would encourage the accommodation of State-of-the-Art Infrastructure within clusters. The common facilities would include training and seminar centers for workers, testing labs, an archive center to serve as a support for further research, and documentation of traditional art-forms. Civil society organisations such as the Monarka Foundation can work with local artisans and fund the projects.

Institutional Information Interpolability and Acquisition

Rajasthan is home to several institutions that nurture local art forms and traditional craftsmanship. While each institution maintains a database of artists around its region of operation, an integration of databases of different regions will aid in awareness of artists' information at the pan-state level and the design of focused policies for the socio-economic development of artists and artisans. However, there is a lack of information interpolability among institutions. In this regard, leveraging modern technology will lead to efficient documentation of resources and in turn potentially enhance the existing structure of the state government's digital mission.

- New technologies such as photogrammetry and 3D laser scanning should be used for documentation, surveys, excavation and conservation works. This entails financial support from the Government to collaborate with Indian and foreign universities to introduce the latest techniques.
- Due to the limited information available online, tourists visit prominent locations and witness the most common traditional art forms in the state. In this regard, two-fold personnel support and a regional mandate is required from the Government. The first group of resources deployed would work on documentation and archiving on a daily basis. The second group would work on identifying artists in a particular region and collating detailed information on them. A yearly review of the database will help track the evolving structure of the culture and market among other benefits.

Local Handicraft Certification/Standardization

In prime tourist destinations it is important to sustain the integrity, authenticity and cultural value of both tangible and intangible cultural heritage. However, due to the

emergence of duplicates and similar products authenticity is often compromised. For example, the quality of products and service a tourist can experience at a heritage hotel may differ from the experience in another hotel with the same name.

- Certification marks the authenticity of a product or service which is crucial in a tourist destination like Rajasthan. For instance, there are state and local level licensed tourist guides in Rajasthan. Technical assistance from the government should be focused towards compliance and the design of similar certification strategies in other tourist-related products and services.

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ANNEXURE A
INTANGIBILITY WEIGHTS TO CULTURAL ASSETS

Table A.1: Festivals

Festival	Sub-elements	Intangibility weight	Festival	Sub-elements	Intangibility weight
Desert Festival	Rajasthani folk music and dance (Gair and fire dance)	1	Holi (Shekhawati Utsav)	Heritage walks	1
	Turban Tying	1		Folk Music	1
	Moustache competition	1		Folk Dance	1
	Camel rides	1		Traditional sports events	1
	Display of artefacts	0.67	Marwar Festival	Folk Music	1
	Handicrafts and souvenirs	0.67		Folk Dance	1
	Food	0.33		Camel decoration	1
Jaipur Literature Festival	Panel discussions	1	Tattoo shows	1	
	Debates	1	Puppetry	1	
	Readings	1	Polo matches	1	
	Concerts	1	Kumbhalgarh Festival	Sufi songs	1
	Cultural performances	1		Folk dance	1
	Book sales	0.33		Sapera dance	1
	Lifestyle shops	0.67		Puppetry	1
Braj Holi	Holi	1	Light and sound show	1	
	Ras Leela dance	1	Display of local jewelry, ethnic wear, handicrafts	0.67	

Festival	Sub-elements	Intangibility weight	Festival	Sub-elements	Intangibility weight
	Grameen Haat	0.67		Camels	1
Rajasthan International Folk Festival	Folk Music	1		Chariots	1
	Folk Dance	1		Bullock carts	1
Sufi Festival	Sufi Music	1	Gangaur Festival	Dancing folk artists	1
	Sufi Dance	1		Purchase of earthen pots in mandana style	0.67
				Wooden figurines and idols painted by Matherans	0.67

Note: intangibility weights are complete = 1; major = 0.67; partial = 0.33; negligible = 0.

Table A.2: Handicrafts

Craft	Intangibility weight	Craft	Intangibility weight
Tie and Dye	0.33	Ittar (Perfumes)	0.33
Leather Shoemaking	0.33	Phad (Folk Painting)	0.33
Lac Bangles	0.33	Marble Handicrafts	0.33
Earthen Pots	0.33	Wooden Toys and Furniture	0.33
Handmade Paper	0.33	Meenakshi (Enameling)	0.33
Hand printing Embroider, Patchwork	0.33	Usta Kaam (Gesso Painting)	0.33
Iron Utensils and Other Kitchenware	0.33	Matherans (Gangaur Idol Makers)	0.33
Leatherwork	0.33	Blue Pottery	0.33
Kota Doria	0.33	Razai making	0.33
Hand weaving	0.33	Black Pottery	0.33
Miniature Painting	0.33	Kumbhars	0.33
Stone Carving	0.33	Kundan Work	0.33
Thewa Kala (Jewelry)	0.33	Hand block painting	0.33
Terracotta	0.33	Sandalwood Work	0.33
Carpet Weaving	0.33		

Note: intangibility weights are complete = 1; major = 0.67; partial = 0.33; negligible = 0.

Table A.3: Fairs

Fair	Sub-elements	Intangibility weight	Fair	Sub-elements	Intangibility weight
Pushkar Camel Fair	Camel Rides	1	Bikaner Camel Fair	Camel Parade	1
	Rajasthani Folk Dance	1		Rajasthani Folk Dance	1
	Competitions	1		Competitions	1
	Games	1		Games	1
	Fireworks	1		Fireworks	1
	Handicraft Stalls	0.33		Unique Selection of Produce derived from camels on offer	0
	Snacks	0.33			
	Sweetmeats	0.33			
	Ice crushes	0.33			
	Bangles	0.33			
	Camel Saddles	0.33			
	Camel Trade	0			
	Livestock Trade	0			

Note: intangibility weights are complete = 1; major = 0.67; partial = 0.33; negligible = 0.

Table A.4: Folk Arts

Folk Art	Sub-elements	Intangibility weight	Folk Art	Intangibility weight
Kavaad Banchana	Boxes created for storytelling	0.33	Chari	1
	Story Telling by Kavadiya Bhat	1	Kachhi Ghodi	1
Kavadiva Bhat		1	Gair	1
Manganiyars		1	Kurjan	1
Ghoomar		1	Kachhi Ghodi	1
Bhavai		1	Maand	1
Kalbelia		1		

Note: intangibility weights are complete = 1; major = 0.67; partial = 0.33; negligible = 0.

Table 2.5: Performing Arts

Performing Art	Intangibility weight	Performing Art	Intangibility weight
Nukkad Natak	1	Kathak	1
Dandiya	1	Kabir Dohe	1
Bharatanatyam	1	Fire Dance	1
Kathputli	1		

Note: intangibility weights are complete = 1; major = 0.67; partial = 0.33; negligible = 0.

Table A.6: Language

Language	Intangibility weight	Language	Intangibility weight
Marwadi	1	Harauti	1
Mewari	1	Malvi	1
Dhundhari	1	Vaagdi	1
Mewati	1		

Note: intangibility weights are complete = 1; major = 0.67; partial = 0.33; negligible = 0.

Table A.7: Oral Traditions

Oral Tradition	Sub-elements	Intangibility weight
Proverbs		1
Songs	Parnet, Bana-Bani, Olyu, Kajaliyo, Pawna, Jalal, Seethne, Moriya, Chirmi, Bindola, Indoni, Lawani, Kaga, Panihari, Kurjan, Hichki, Sunwatiya, Peepali, Bichhudo, Ghudla, Moomal, Gorbant, Dhola-Maru, Kangasiyo, Hamseedo, Languriya, Ghoomar,	1
	Khayal, Tamasha, Rammat, Phad, Swang, Gavari, Nautanki, Bhawai, Gandharva, Dungal Natya, Nukkad Natak	1

Note: intangibility weights are complete = 1; major = 0.67; partial = 0.33; negligible = 0.

Table A.8: Social Practices

Social Practice	Intangibility weight	Social Practice	Intangibility weight
Parda System	1	Namkaran	1
Nata Pratha	1	Mundan	1

Table A.9: Sacred Groves

Sacred Groves	Sub-elements	Intangibility weight	Sacred Groves	Sub-elements	Intangibility weight
Deorai		1	Ekpaniya Bavsai		1
Malvan		1	Kankar Bani		1
Rakhat Bani		1	Dev Ouranya		1
Oran		1	Vall		1
Ubeshwarji		1	Dev Bani		1
Taneshwarji		1	Kalpavriksha		1
Karai van Annual Fest for Lord Shiva	Handicrafts Stall	0.33	Amrakji		1
	Folk Dance Performances	1	Malpur		1
	Dramatic Performances	1	Deonarayan		1
	Food	0.33	Khezri		1

Note: intangibility weights are complete = 1; major = 0.67; partial = 0.33; negligible = 0.

PROPOSED IMPLEMENTATION PLAN

Esya Centre, a Delhi-based think tank completed a 6 month-long project under the aegis of the Chief Minister’s Rajasthan Economic Transformation Advisory Council (CMRETAC). This report, titled “**Quantifying the Contribution of Intangible Cultural Assets to the Economy: The State of Rajasthan**”, lists a comprehensive set of policy recommendations for the protection, preservation, & promotion of intangible cultural assets (ICAs) in the state. In addition, the report also highlights the collective voices of stakeholders as well as the complex intersection of ICAs with economic agents across various areas through two-dozen case studies. It is a pioneering study in this field owing to its exhaustive scope & state-wide coverage.

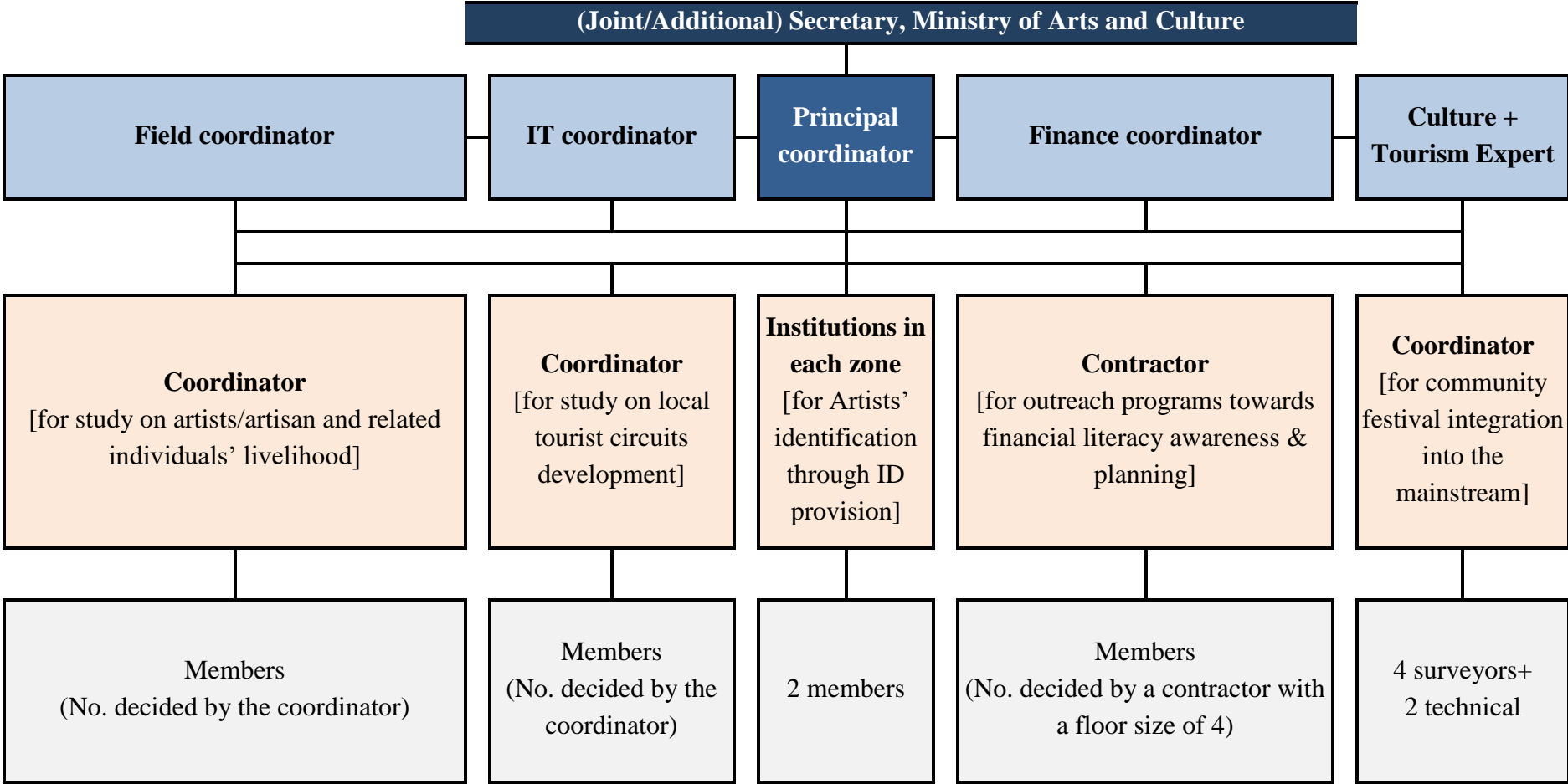
This draft discusses the implementation structure of the recommendations for the protection, preservation, & promotion of ICAs in the state. It includes the overall outlay for implementing the suggested policy measures, organizational chart for administrative coordination, as well as a month-wise timeline of the expected progress.

ESTIMATED BUDGET

Strategic Areas of the Action Plan	Est Total Cost (INR, crores)
Overall Coordination	0.54
Identification & Awareness	3.4356
ICA driven Tourism development	0.654
Preservation & Promotion of ICA & landscape	7.3962
Total	12.0258
Contingency Fund (20 percent of the total)	2.40516
Gross Total	14.43096

Note: Some of the suggested policies may fall under the ambit existing framework led by the state government. For accurate estimates, it is imperative to assess the budget allocation towards the respective policies.

ORGANIZATIONAL CHART



A: Overall Coordination

Action Plan	Government Intervention	Monitoring Frequency	Reporting Department	Details	Estimated Annual budget				
1. Programme Coordination	Appoint nodal members for overall coordination	Annual	Ministry of Art and Culture	Step 1: Designate a five-member team for overall coordination (Composition: Principal, Finance, IT, Field, & Expert]	Total annual outlay (INR crores) 0.54				
					Person count	Compensation, INR '000	Months	Total	
					Coordinators	5	70	12	4,200
					Overhead per coordinator: 200				1,200

B: Identification & Awareness

Action Plan	Government Intervention	Monitoring Frequency	Reporting Department	Details	Estimated Annual budget					
1. Artists' identification through ID provision	Creation of an artist database & allocation towards digitising this data	Annual	Ministry of Art and Culture	Step 1: Designate an institution in each cultural zone for data collection/collation. Step 2: Designate a two-member team at each zonal institution to compile the database.	Total annual outlay (INR crores) 1.68					
					Person count	Compensation, INR '000	Months	Zone	Total	
					Zonal Member	2	50	12	12	14,400
					Overhead per unit (12 Zones): 200				2400	
2. Conduct Outreach programs toward financial literacy awareness & planning	Conduct district-level 4-day workshops (quarterly) Arrange trade fair on the side to incentivize private sponsorships & marketplace operations (Year 2 onwards)	Annual	Ministry of Art and Culture	Step 1: Contract (annual) a coordinator (with a minimum of a four-member team) for workshop conduct in each district. Step 3: Year two onwards, auction slots for private display & sale in the fair. Auctions should meet a minimum of 70% of the entire cost.	Total annual outlay (INR crores) 1.7556					
									Compensation, INR '000	
									Districts	
					Contract amount, personal (lumpsum, 16 days*4 members*INR 3000 daily)				33	6,336
					Contract amount, location (lumpsum, 16 days* INR 15,000 daily)				33	7,920
Overhead per unit (33 Districts): 100				3300						
Total Estimated Annual budget					INR 3.4356 Crores					

C: ICA driven Tourism Development






Action Plan	Government Intervention	Monitoring Frequency	Reporting Department	Details	Estimated Annual budget				
1. Integrate community festivals with mainstream cultural offerings	Collate & digitize information of district-level events. Geo-tag locations & events for authenticity.	Annual	Ministry of Art and Culture	Step 1: Deploy six professionals (four surveyors + two technical) with equipment for geo-tagging & monthly targets. In addition, digitize the information collected.	Total annual outlay (INR crores) 0.324				
					Person count	Compensation, INR '000	Months	Total	
					Surveyors	4	40	12	1920
					Technical support	2	40	12	960
Overhead per unit (6 professionals): 60					360				
2. Local tourist circuits development	Viability assessment for creating lodging in villages to facilitate tourists' engagement with locals & increase community participation.	-	Ministry of Art and Culture	Step 1: Commission a study with focus on (A) cost-benefit analysis (B) Expected private sector participation (C) Impact (economic & social) on the local economy	Lumpsum project cost (INR '000): 3300				
Total Estimated Annual budget					INR 0.654 Crores				

D: Promotion & Preservation of ICAs

Action Plan	Government Intervention	Monitoring Frequency	Reporting Department	Details	Estimated Annual budget																														
1.Promotion of commercial galleries for monetizing local art-forms	Put in place district-level display-&sale platforms for artisans to display & monetize their art form.	Annual	Ministry of Art and Culture	<p>Step 1: Use the facility for trade fairs [Programme B2]</p> <p>Step 2: Assign a team of 2 member-team for quality checks & certification in each district.</p> <p>Step 2: Put in place a nominal participation fee from vendors (Rs. 500 daily) & entry fee from visitors (Rs. 20 per visit)</p> <p>Step 3: Allocate three monetary rewards for zonal competition – based on sale value, for each gallery (Rs. 25,000, 15,000 & 10,000).</p> <p>Step 4: Auction slots for the sale of ancillary provisions (food, kid zone, etc.) at a floor rate of Rs. 10,000 per gallery.</p> <p>Step 5: Promote these galleries through news publishing + social media (Interns).</p>	<table border="1"> <tr> <td colspan="5">Total annual outlay (INR crores)</td> <td>7.062</td> </tr> <tr> <td></td> <td>Person count</td> <td>Compensation, INR '000</td> <td>Month</td> <td>District</td> <td>Total</td> </tr> <tr> <td>Certification Specialists</td> <td>2</td> <td>60</td> <td>12</td> <td>33</td> <td>47520</td> </tr> <tr> <td>Promotion (lumpsum, per district)</td> <td>50</td> <td></td> <td>12</td> <td>33</td> <td>19800</td> </tr> <tr> <td colspan="5">Overhead (33 districts, per district): 100</td> <td>3300</td> </tr> </table>	Total annual outlay (INR crores)					7.062		Person count	Compensation, INR '000	Month	District	Total	Certification Specialists	2	60	12	33	47520	Promotion (lumpsum, per district)	50		12	33	19800	Overhead (33 districts, per district): 100					3300
					Total annual outlay (INR crores)					7.062																									
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Certification Specialists	2	60	12	33	47520																														
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Overhead (33 districts, per district): 100					3300																														
2. Livelihood assessment of ICAs	Study the income dimensions of ICA practitioners.	-	Ministry of Art and Culture	<p>Step 1: Commission a study with focus on (A) List of practitioners & existing means of livelihood (B) policy gaps in mitigating their livelihood risk.</p>	<table border="1"> <tr> <td>Lumpsum project cost (INR '000):</td> <td>3300</td> </tr> </table>	Lumpsum project cost (INR '000):	3300																												
Lumpsum project cost (INR '000):	3300																																		
Total Estimated Annual budget					INR 7.3962																														

E: Timeline: Proposed plan for 1 Year

No.	Description	1	2	3	4	5	6	7	8	9	10	11	12
1	Constitute a team of Coordinators	Inception	Onboarding	Work as per plan	Work as per plan	Work as per plan	Work as per plan	Mid-term review	Work as per plan	Work as per plan	Work as per plan	Work as per plan	Annual review
2	Select art institutions to build a pan-state artists database	Inception	Onboarding	Onboarding	Work as per plan	Work as per plan	Work as per plan	Mid-term review	Work as per plan	Work as per plan	Work as per plan	Work as per plan	Annual review
3	Hire third-party organization for workshops	Inception	Onboarding	Onboarding	Work as per plan	Work as per plan	Work as per plan	Mid-term review	Work as per plan	Work as per plan	Work as per plan	Work as per plan	Annual review
4	Designate members to conduct auctions	Inception	Onboarding	Onboarding	Work as per plan	Work as per plan	Work as per plan	Mid-term review	Work as per plan	Work as per plan	Work as per plan	Work as per plan	Annual review
5	Deploy professionals for Geo-tagging	Inception	Onboarding	Onboarding	Work as per plan	Work as per plan	Work as per plan	Mid-term review	Work as per plan	Work as per plan	Work as per plan	Work as per plan	Annual review
6	Contract agency for the study on building tourist accommodations in villages	Inception	Onboarding	Onboarding	Work as per plan	Work as per plan	Work as per plan	Mid-term review	Work as per plan	Work as per plan	Work as per plan	Work as per plan	Annual review
7	Designate team for certification/quality check of products & services	Inception	Onboarding	Onboarding	Work as per plan	Work as per plan	Work as per plan	Mid-term review	Work as per plan	Work as per plan	Work as per plan	Work as per plan	Annual review
8	Select galleries where events can be conducted for the promotion of local arts	Inception	Onboarding	Onboarding	Work as per plan	Work as per plan	Work as per plan	Mid-term review	Work as per plan	Work as per plan	Work as per plan	Work as per plan	Annual review
9	Monitor social media engagement	Inception	Onboarding	Onboarding	Work as per plan	Work as per plan	Work as per plan	Mid-term review	Work as per plan	Work as per plan	Work as per plan	Work as per plan	Annual review
10	Discuss action plan for studies to be commissioned	Inception	Onboarding	Onboarding	Work as per plan	Work as per plan	Work as per plan	Mid-term review	Work as per plan	Work as per plan	Work as per plan	Work as per plan	Annual review

Key	 Inception	 Onboarding	 Mid-term review	 Work as per plan	 Annual review
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**Chief Minister's Rajasthan Economic
Transformation Advisory Council (CMRETAC)**

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