



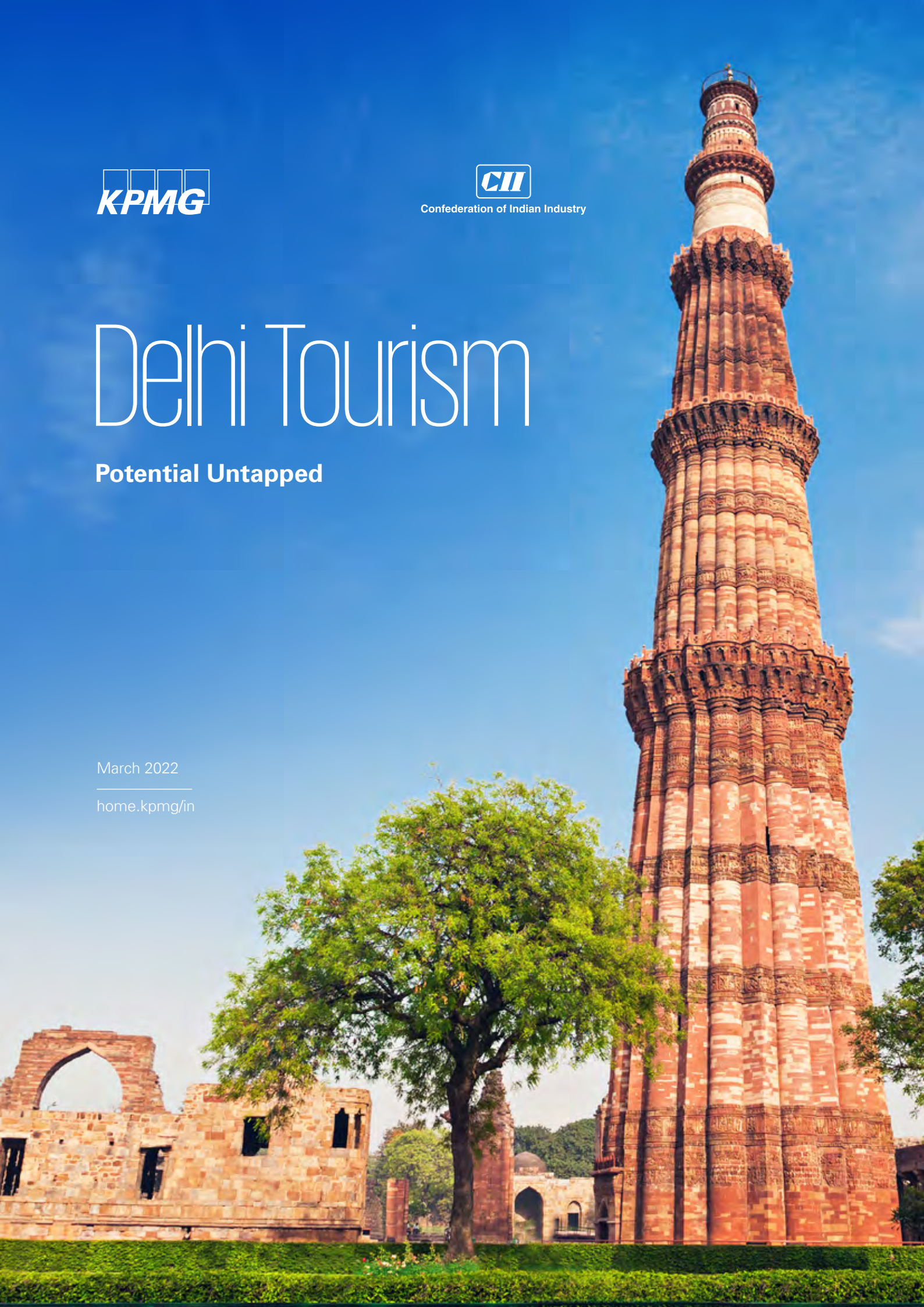
Confederation of Indian Industry

Delhi Tourism

Potential Untapped

March 2022

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Foreword KPMG In India

Tourism is a social, cultural and economic phenomenon which entails the movement of people to countries or places outside their usual environment for personal or business/professional purposes.

Over the years, tourism has acted as a catalyst for economic growth across the world. Multiple important phenomena such as exchange of ideas and multi-cultural interactions to name a few have been facilitated by tourism.

With the advent of COVID-19, which was declared as a pandemic by World Health Organization in March 2020, tourism and tourism related activities took a nosedive owing to worldwide lockdowns resulting in restricted movements of individuals across the globe.

However, some specific tourism-driven economies such as Dubai, Paris and Maldives, which are primarily driven by leisure tourism, were amongst the first ones to show signs of recovery and continue to do so as restrictions ease out across the globe propelling tourism. This was primarily due to varied leisure offering they present to the tourist and the inherent need to travel.

KPMG in India in its tourism practice is engaged in making efforts to evangelise tourism solutions and support multiple governments and government organisations to design state-wide tourism masterplans and policies, facilitate transactions advisory services and a bouquet of other tourism-centric solutions.

In this point of view, it is our sincere effort to provide an 'as-is analysis' of the existing tourism landscape in Delhi, the potential of Delhi to become an international marquee tourist destination, a brief comparison of Delhi with some of the established international tourist destinations and some measures, if taken appropriately by the authorities can help bring about this evolution of Delhi.

We hope you find the contents of this point of view insightful.

Vivek Agarwal

Partner

Government Advisory

Government and Public Services (G&PS)

KPMG In India

Foreword CII

Tourism is a fast-growing industry, and is a key driver for socio-economic progress. The sector has emerged as an effective instrument of employment generation, poverty alleviation and sustainable human development.

Delhi is a cosmopolitan city with a historic old Delhi and the modern New Delhi. Exploring the city is like witnessing a mini-India. With an extra day spent by a Tourist in Delhi – “Delhi Economy booms and people earn more”.

COVID-19 – despite its negative impact on the tourism industry – has turned into a rare opportunity to fix challenges that have long plagued the sector. Our State tourism policies are evolving to create a COVID-ready, sustainable, resilient destination, to gradually unleash the City's immense tourism potential.

Delhi has so much to offer and gaining recognition as a cultural destination. To ensure Delhi becomes a world-class tourist destination and the leader in art, culture, music, theatre, film and entertainment, the CII Delhi State Panel on Tourism and KPMG have collaborated to come out with a Report that will be a great reference document for the stakeholders including the state governments/ union territory administrations.

As Chairman of the CII Delhi State, I am thankful to KPMG for devoting a lot of energy and resources to put together this report, that too during some of the most challenging times brought about with the ongoing pandemic.

Happy reading..!!

Madhav Singhania

Chairman, CII Delhi State and
Deputy MD & CEO, JK Cement Limited

The Travel and Tourism Industry

The World Tourism Organization (WTO) defines tourism as following:

Tourism is a collection of activities, services and industries which deliver a travel experience comprising transportation, accommodation, eating and drinking establishments, retail shops, entertainment businesses and the hospitality services provided for individuals or groups traveling away from home

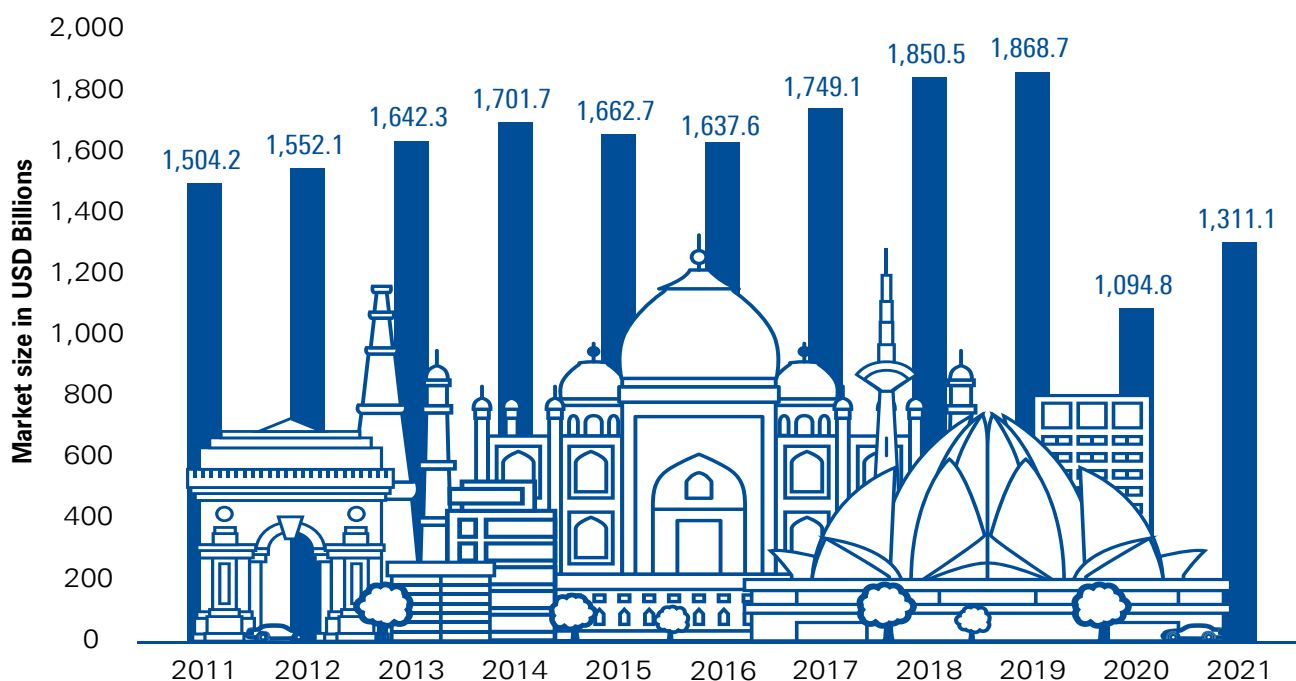


The travel and tourism industry is one of the world's largest economic sectors, helping create jobs, driving exports and generating prosperity across the globe. The sector comprises a wide range of industries aiming to serve and support domestic, international, business and leisure visitors. Industries ranging from airlines, accommodation, transportation, food and beverage, retail, sports and recreation, to name a few, fall under the ambit of travel and tourism.

Globally, tourism has proved to be an economic powerhouse, evidenced by the fact that travel and tourism GDP growth outpaced the global economy GDP growth for nine consecutive years between 2011-2019. In 2019, travel and tourism GDP accounted for¹ 10.4 per cent (USD9,170 billion) of the global economy GDP, whereas it accounted for only 5.5 per cent (USD4,671 billion) of the global economy GDP in 2020.

As per the WTTC's Global Economic Impact and Trends, 2021, the global travel and tourism industry contributes 1 in 10 jobs across the world, i.e., 10 per cent of the global employment.

Below is a graph representative of the cumulative size of the tourism industry globally.



Source: Global Economic Impact and Trends, WTTC

1. WTTC's Global Economic Impact and Trends 2021

A steep decline in 2020 and a sluggish recovery in 2021 and onwards are attributed to the catastrophic impact of COVID-19

- 1 **Loss of \$4.5 Trillion**
- 2 **62 Million jobs lost**
- 3 **Accounted for 5.5% of Global GDP**
- 4 **Domestic Spending down by 45%**
- 5 **International Spending down by 69.4%**
- 6 **-49.1% change in T&T GDP change in 2020**

Source: WTTC, 2021



Impact of Covid-19 Pandemic

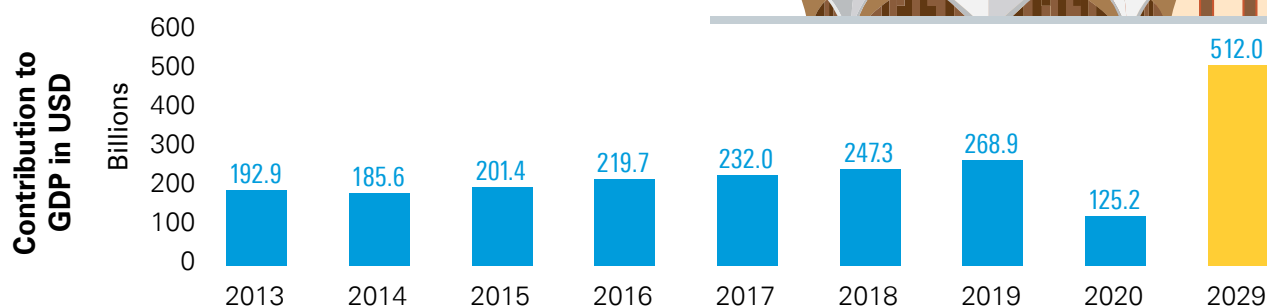
COVID-19 has been devastating for the travel and tourism industry causing considerable losses for the individuals employed by the sector and the communities and livelihoods that depend on that income. Globally in 2020, the sector experienced a USD4.5 trillion² drop in GDP and losses of approximately 62 million jobs around the globe. Yet, as governments and businesses implemented measures to proactively address COVID-19, social lives slowly began to resume. In turn, traveler demand and positive consumer sentiment around travel continues to grow, giving hope to all those who depend on the travel and tourism sector for survival.

WTTC's latest October 2021 projections not only show promising growth opportunities in the domestic market for 2021 but also a rise in international travel which will further accelerate in 2022 and beyond. Following a 49.1 per cent decline in 2020, travel and tourism GDP is projected to rise by 30.7 per cent in 2021 and 31.7 per cent in 2022 respectively.

Travel & Tourism Industry in India

The travel and tourism sector is one of the largest service industries in India. The sector plays a role of significant economic multiplier and becomes critical as India aims to grow at a rapid rate and create jobs. India offers geographical diversity, world heritage sites and various niche tourism products such as cruises, adventure, medical, eco-tourism, etc.

The sector had been experiencing a healthy year-on-year growth till 2019. The advent of COVID-19 has temporarily halted the growth of tourism in India and across the globe. However, owing to the India's overall tourism offering and positive long-term growth vision, the sector is expected to resume its growth trend in the long-run.



Source: Tourism Statistics, Ministry of Tourism, GOI, 2020

2. WTTC's Global Economic Impact and Trends 2021

Travel and tourism has been a leading sector for driving growth for India historically. The sector has been undergoing its biggest crisis since the pandemic hit India resulting in a nationwide lockdown in March 2020. Reeling from the pandemic's catastrophic impact, the travel and tourism sector accounted for 4.7 per cent³ of the country's GDP (USD121.9 billion) in 2020 as opposed to accounting for 6.9 per cent (USD191.3 billion) of the country's GDP in 2019. The steep reduction in travel and tourism demand of over 30 per cent significantly impacted the sector.

The sector generated roughly 31.7 million jobs⁴ (direct as well as indirect) which translates to 7.3 per cent of the total employment of the Indian economy. According to WTTC, in 2019, India ranked 10th among 185 countries in the world in terms of the travel and tourism sector's total contribution to the GDP. Additionally, India's travel and tourism sector's contribution to generating employment ranked second, only after China.

According to KPMG in India's research, domestic travel spending generated approximately 80-85 per cent of the direct travel and tourism GDP in 2020. With corporate travel coming to a standstill due to 'work from home' becoming prevalent for a majority of the

pandemic year, business spending accounted for a mere 2-5 per cent of the direct travel and tourism GDP of the country. The leisure wallet, on the other hand, continued to dominate, accounting for approximately 93-97 per cent of the direct travel and tourism GDP of the country.

India witnessed approximately a 70-75 per cent⁵ drop (2.68 million arrivals) in foreign tourists in 2020, owing to international travel coming to a halt for majority part of the year.

As time has progressed, the impact of COVID-19 has shown signs of subsiding and consequently, the travel and tourism sentiment has improved. The domestic tourism segment has shown sharp spikes as and when travel restrictions and rules have been relaxed. Multiple trends such as weekend getaways, staycations, focus on health and safety, increasing preference to drive to close by locations to name a few have been gaining prominence.

To capitalise on the improving sentiment, the tourism ministry will soon unveil a new tourism policy, which is expected to focus on further developing tourism as a priority industry. Emphasis on medical and religious tourism and adding more destinations to the prevailing ones is also expected to be part of the new policy.

3. Organization for Economic Cooperation and Development (OECD), 2020

4. IBEF

5. Ministry of Tourism, Government of India, 2020

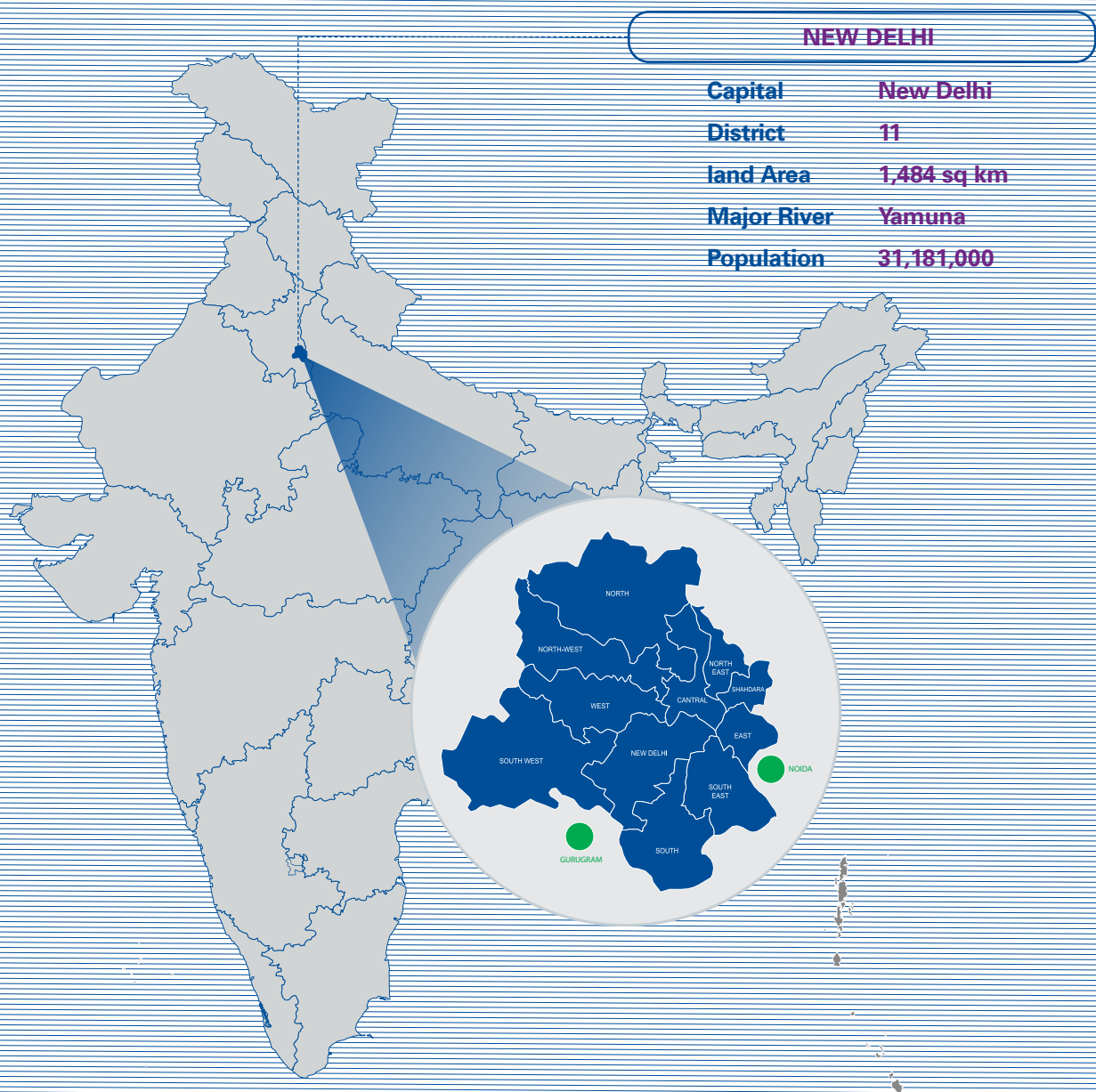


New Delhi: An Overview

Delhi, officially the National Capital Territory (NCT) of Delhi, is a city and a union territory of India containing Delhi, the capital of India. Located beside the Yamuna river, Delhi is bordered by the state of Haryana on three sides and Uttar Pradesh on one side. New Delhi today is one of the fastest growing cities in both India and the world owing to its dynamic and progressive governance. It is the government, commercial and financial centre of India. Delhi is home to all three branches of government of India, hosting the Rashtrapati Bhavan, Parliament House and the Supreme Court of India.

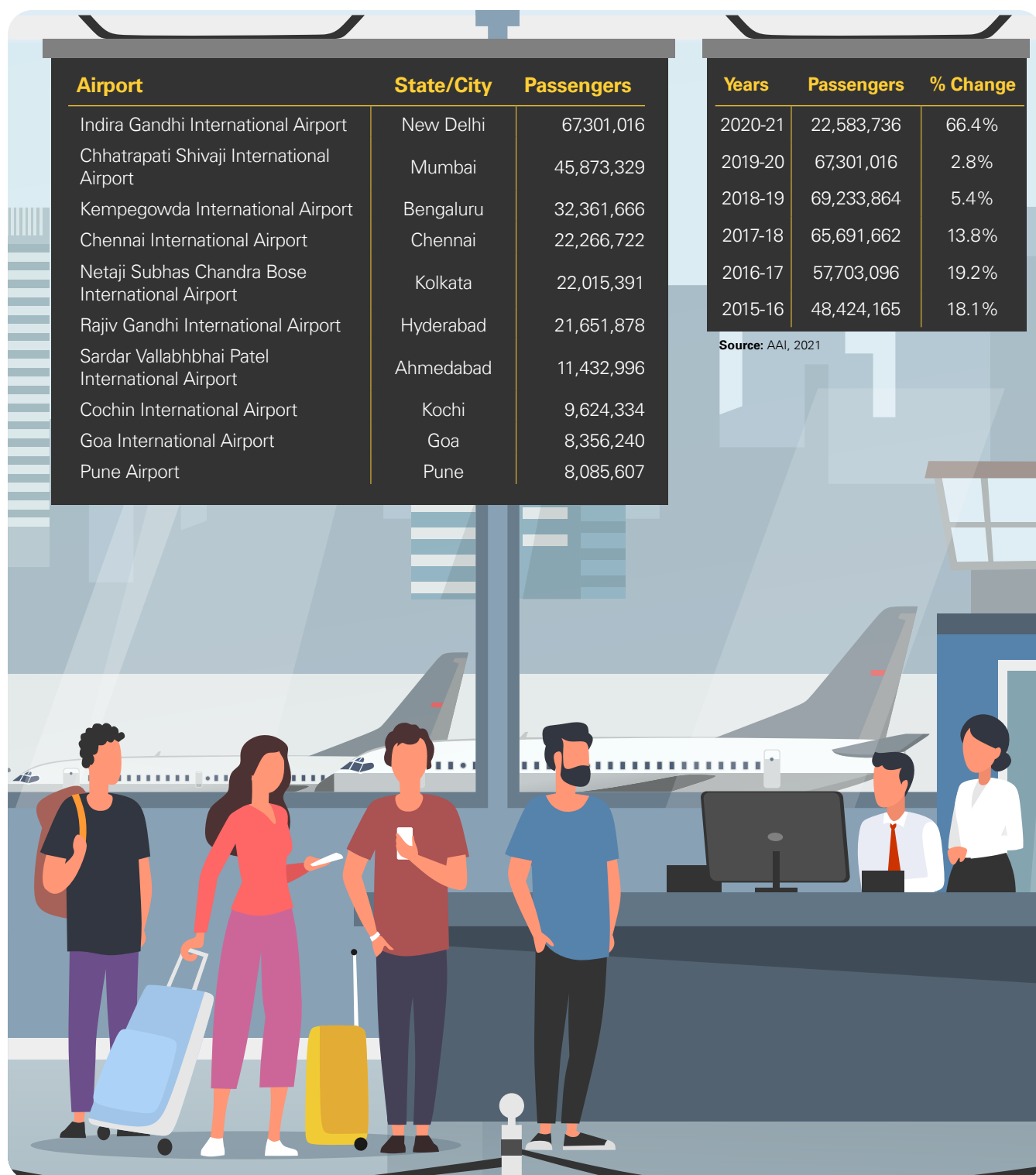
Although, colloquially, Delhi and New Delhi are used interchangeably to refer to the National Capital Territory of Delhi (NCT), these are distinct entities, with both the municipality and the New Delhi district forming a relatively small part of the megacity of Delhi. The National Capital Region (NCR) is a much larger entity comprising the entire NCT along with adjoining districts in neighbouring states, including Ghaziabad, Noida, Gurugram and Faridabad with a combined population of approximately 31 million⁶ as in 2021, making it the largest metropolitan area in India and second-largest in the world.

6. National Capital Region Planning Board (NCRPB)



Delhi is a cosmopolitan city with a historic old Delhi and the modern New Delhi. The city offers an interesting blend of historical monuments to crowded shopping malls, from an extensive network of modern metro system to Delhi university complex, Delhi has multiple personalities and is considered to be the city with a heart.

According to AAI and ACI respectively, Delhi is home to India's busiest airport and world's 16th busiest, the Indira Gandhi International Airport. Below are few data points to substantiate this statement.



Delhi tourism - As is assessment

Delhi is blessed with a plethora of tourism products such as captivating ancient monuments, fascinating museums and art galleries, architectural wonders, a vibrant performing-arts scene, fabulous eating places and bustling markets. With its rich and diverse cultural heritage, Delhi is also used as a gateway for travelling to most of the cities of India, owing to its excellent linkages with the rest of the country through road, rail and air. In addition, Delhi is part of India's one of the most famous and iconic tourism circuits, the Golden

Triangle, which also includes Agra, home to the famous Taj Mahal and Jaipur, another famous tourism destination and capital of Rajasthan.

The city is significant for the role it has played throughout history, having been the centre of an empire for the majority of this millennium. It is an important city in the Indian subcontinent and comparisons have often been made to other great cities of the world, such as London, Paris and Dubai owing to similar broad characteristics.

Years	Domestic Tourist Arrivals	Foreign Tourist Arrivals	Total Tourist Arrivals	Growth %
2016	25,891,636	23,45,137	25,891,636	5%
2017	27,126,678	24,67,921	27,126,678	5%
2018	29,114,423	27,40,502	29,114,423	7%
2019	36,467,598	29,83,436	36,467,598	25%
2020	26,478,463	12,34,671	26,478,463	-27%

Source: Tourism Statistics Report, Ministry of Tourism, GOI

As per Ministry of Tourism's statistics, 2020, Delhi ranks 4th in the list of cities which receive the highest number of foreign tourist arrivals (FATs) in the country, while it does not even feature in the top 15 when it comes to domestic tourist arrivals (DTAs), which remains as one of the biggest challenges it faces.

Owing to lower domestic footfalls, which make the lion's share of tourists in India, more so post COVID-19, wherein close to 92-97 per cent tourism footfalls are domestic, tourism-related employment has been stagnant and is confined majorly to the

accommodation and food and beverage sector in Delhi.

However, despite numerous points of interests, Delhi is still perceived to be a transit destination leading to a relatively lower 'Average length of Stay' (ALOS) of any passenger/traveller leading to lower spendings on tourism and tourism-related activities in the city.

Much like other states and countries, Delhi's tourism has also taken a nosedive owing to the impact of COVID-19. Various measures such as:

Entry only to fully vaccinated tourists



Mandatory quarantine for passengers coming from countries severely affected by COVID



COVID-19 volunteers are undertaken to ensure safety.



Maintaining social distancing

Following proper COVID-19 protocol



Tourism assets

Delhi is majestically a mixture of two parts; Old Delhi, which is representative of the old world charm, heritage and culture of the city and New Delhi, which represents the more modern and developed part of the city dotted with high rise buildings, modern office spaces and a bustling food and beverage landscape. Both parts have their unique offerings, allowing the tourist an opportunity to experience the evolution in real time.

Old Delhi and New Delhi

Old Delhi or Purani Dilli is an area in the city of Delhi, India. It was founded as a walled city named Shahjahanabad in 1639, when Shah Jahan (the Mughal emperor at the time) decided to shift the Mughal capital from Agra. It was once filled with mansions of nobles and members of the royal court, along with elegant mosques and gardens.

Old Delhi is famous for its markets (locally called bazaars), its old world charm and its food. Chandni Chowk is a popular market, famous for its wedding shopping. All articles related to wedding, especially clothes and jewellery, are available in abundance in this market. The market is also always busy and bustling, especially close to the wedding season.

Numerous famous Old Delhi restaurants such as Karims, Al Jawahar, Paranthi wali gali, Natraj Dahi Bhalle to name a few are on to-do list of tourists. There are Old Delhi food walks that are organised by various tour operators as part of their tour packages.

Recently, the Government of NCT of Delhi undertook an upgradation drive to modernise and systemise Chandni Chowk.

Old Delhi has excellent connectivity from any corner of the city. Dedicated metro stations and easy access via road make Old Delhi a must-visit for any tourist who arrives in Delhi.

New Delhi comprises a majority of the famous tourist hotspots such as India Gate, Qutub Minar, Lotus Temple to name a few. In addition, famous museums and gardens such as National Museum, Indian Air Force Museum, Lodi Gardens, Mughal Gardens, etc. are also in New Delhi.

NCR region offers modern food and beverage options with micro-markets such as Hauz Khaz Village, Vasant Kunj, Delhi Aerocity, Sector 29 Gurgaon, DLF Cyber Hub, etc.

In addition, the city has multiple cultural, religious and heritage tourism products to offer.



Chandni Chowk



Lodi Gardens



National Museum

Old Delhi

- Jama Masjid
- Chandni Chowk & Chawri Bazaar
- Humayun's Tomb
- Daryaganj
- Gurudwara Sis Ganj Sahib
- St James Church
- Paranthi Wali Gali
- Khari Baoli Spice Market
- Salimgarh Fort

New Delhi (includes NCR)

- Rashtrapati Bhawan
- India Gate
- Gurudwara Bangla Sahib
- Qutub Minar
- All major hotels
- Central Business Districts
- Millennium City
- The It/Ites hub of Noida



Existing tourism infrastructure in Delhi



MICE

- Pragati Maidan, managed by India Trade Promotion Organization
- Habitat World Convention Centre
- NDMC Convention Centre
- India International Centre



Hotels

- Budget hotels
- Mid-market hotels
- Upscale hotels
- Luxury hotels
- Bed and breakfast accommodation
- Weekend getaways etc



Religious Tourism Infrastructure

- Birla Mandir
- Kalka Mandir
- Akshardham Temple
- ISKCON temple
- Lotus Temple
- Chhatarpur Mandir
- Bangla Sahib Gurudwara
- Jama Masjid
- Sacred Heart Cathedral



Monuments

- India Gate
- Rashtrapati Bhawan
- Jantar Mantar
- Qutub Minar
- Raj Ghat
- Old Fort
- Humayun's Tomb



Parks & Museums

- Lodi Gardens
- Mughal Gardens
- Sunder Nursery Park
- Talkatora Gardens
- National Museum
- Nehru Memorial Museum & Library
- Gandhi Smriti Museum
- Delhi Metro Museum



Amusement Parks

- Fun n Food Village
- Adventure Island
- Splash, The Water Park
- World of Wonder
- Kanak Garden Water Park
- Delhi Eye
- Scary House
- Aapno Ghar



Nightlife

- Hauz Khas Village
- Khan Market
- Aerocity
- Vasant Kunj
- Nehru place
- Saket
- Cyber Hub
- Connaught Place



When compared to its contemporaries across the globe, Delhi ranks relatively low on the average length of stay index.

In addition to the above mentioned factors, some additional factors that contribute to Delhi's low ALOS are:

- Lack of some key tourism demand drivers such as amusement parks, dedicated entertainment zones, family centres, etc.
- Image of a 'transit destination'
- High density traffic and noise pollution
- Overall air pollution
- Lack of recall value as a tourism getaway (low marketing and promotion with focus on tourism).



City	Length of Stay
Dubai	4.8
Singapore	3.9
Thailand	3.6
London	3.5
Rome	3.3
Colombo	3
Delhi	1.6

Some factors that lead to Delhi's low ALOS



Low Brand recall/
Inadequate
Marketing

Lack of
Integrated
Tourism Offerings






No marquee
events that
resonate with the
city

Unsafe city
image






Case study – Paris vs Dubai vs Delhi

	 PARIS	 DUBAI	 DELHI
01 Total Tourist Arrivals (2019)	35.4 million	16.73 million	2.1 million
02 Average Length of Stay	4.5 nights	4.8 nights	1.7 nights
03 Established Annual Events	YES	YES	NO
04 Average Hotel Occupancy	78%	81%	67%
05 Performance Arenas	The Arena La Chapelle	Coca Cola Arena	NA
06 Family Entertainment Centres	Disneyland	Bollywood Parks Global Village Ski Dubai	Fun n Food Village
07 Centre of Attraction	Eiffel Tower	Burj Khalifa	Qutub Minar
08 World Renowned Museums	Louvre Museum	Dubai Museum	National Museum
09 Annual Events	Paris Fashion Week Fete de la Gastronomie Roland Garros Jazz Festival	Dubai Shopping Festival Dubai Jazz Festival Dubai Tennis Championship Dubai Design Week	Trade Fair Delhi Book Fair



Source: KPMG Research

Criteria for comparison

	 PARIS	 DUBAI	 DELHI
01 Percieved as a global tourist destination	YES	YES	NO
02 International Airport	YES	YES	YES
03 Adequate Tourism Infrastructure	YES	YES	NO
04 Well established Family Entertainment Centres	YES	YES	NO
05 Popular Annual Events	YES	YES	NO
06 Image on Safety Parameters	SAFE	SAFE	NOT SO SAFE
07 High Quality Roadways Infrastructure	YES	YES	NO
08 Large shopping malls	YES	YES	YES
09 High quality marketing and promotion	YES	YES	NO
10 Traffic Conditions	SPACED OUT	SPACED OUT	DENSE
11 High quality tourist facilities	YES	YES	NO
12 Major theme parks	YES	YES	NO
13 Major water parks	YES	YES	NO
14 Live Performance Arenas	YES	YES	NO

Source: KPMG Research

What can Delhi do?

From the above information, we have been able to establish that Delhi has immense tourism potential which is currently untapped. In order to accomplish that, below are a few ideas/concepts:

Delhi Food Festival

'Delhi Food Festival (DFF)', a proposed annual culinary celebration, promises to plate up something to suit every palate. DFF will be dishing out activities that put a spotlight on the dining scene, from bespoke gourmet meals to intimate cooking showcasing the old and new Delhi charm.

It will also be offering up regular lip smacking favourites like set price meals at Delhi Restaurant Week and immersive foodie experiences with an opportunity to interact with the chefs. Patrons will discover homegrown concepts, neighbourhood spots and value-for-money hidden gems, as they embark on delicious journeys through the diverse cuisines this city has to offer.

The festival will feature popular restaurants from both Old Delhi and New Delhi, representing the entire array of delicacies of Delhi.

Preferable to be held between November and January.



Delhi Shopping Festival

'Delhi Shopping Festival (DSF)' is a proposed event expected to take place in November/December each year. Residents and visitors alike can look forward to retail therapy from international and homegrown brands, as well as live entertainment and pop-up thrills for shoppers, foodies and families across the city.

Shopping offerings from various privately run malls and local markets such as Janpath, Lajpat Nagar, Sarojini Nagar, Kamla Nagar, Rajouri Garden, etc. can be synergised and packaged together to present the tourist with the best of both worlds.



Delhi Music Festival

A music festival is a festival oriented towards music that is sometimes presented with a theme such as musical genre, nationality or locality of musicians, or holiday. They are commonly held outdoors, and are often inclusive of other attractions such as food and merchandise vending, performance art and social activities.

Music festivals act as a catalyst for tourism. They usually last from two days up to a week. Music is accompanied with food, alcohol, shopping and general exploration of the city. One of the most famous music festivals in India is the Sunburn Music Festival, conducted annually in Goa. Sunburn Music Festival is extremely popular and has played a crucial role in putting Goa on the international map.



Theme Parks and Adventure Parks in Delhi

Adventure theme parks are the most preferred and visited tourism activity across the globe. Unfortunately, we in India do not have an international quality theme/ adventure park for families to visit. Most of the Indians visit Singapore (Universal Studios) or Macau (Disneyland) to experience high quality entertainment and rides.

Between all the options, creating/building an infrastructure of international quality seems most farfetched but the advantages of such tourism catalysts are immense.



- **Liaise with international firms and encourage them to expand into Delhi**
- **Identify land parcel and undertake a detailed feasibility for the same**
- **PPP model can be explored for such an opportunity**
- **Replicate the model with high efficiency**
- **Provide incentives, tax holidays and other incentives to investors**

Dedicated experiential Delhi tours

One of the proposed ideas is to curate handpicked tours of the city for tourists. These can be divided/ bifurcated basis the kind of tourist infrastructure or

the geography targeted. Some of the examples are as follows:

Tour 1 - Eco-tour

This will focus on the gardens and natural offerings that Delhi has. The tour will include:

- Lodi Gardens
- Mughal Garden
- Sunder Nursery Park
- Talkatora Garden
- Char Bagh Garden
- Rose Garden
- Japanese Garden etc

A tour dedicated to gardens and nature and also help overcome the 'polluted city' image.



This will be a uniquely curated walk with an aim to also educate the tourist about the historical importance of this area. The walk to include some of the most famous food spots and restaurants of Old Delhi.

- Chandni Chowk – wedding market, parathewali gali, Natraj chaat, etc.
- Purani sadak – famous for books
- Chawri Bazaar – famous restaurants such as Karim's and Al Jawahar
- Shishganj Gurudwara
- Jama Masjid etc

Tour 2 - Old Delhi walk



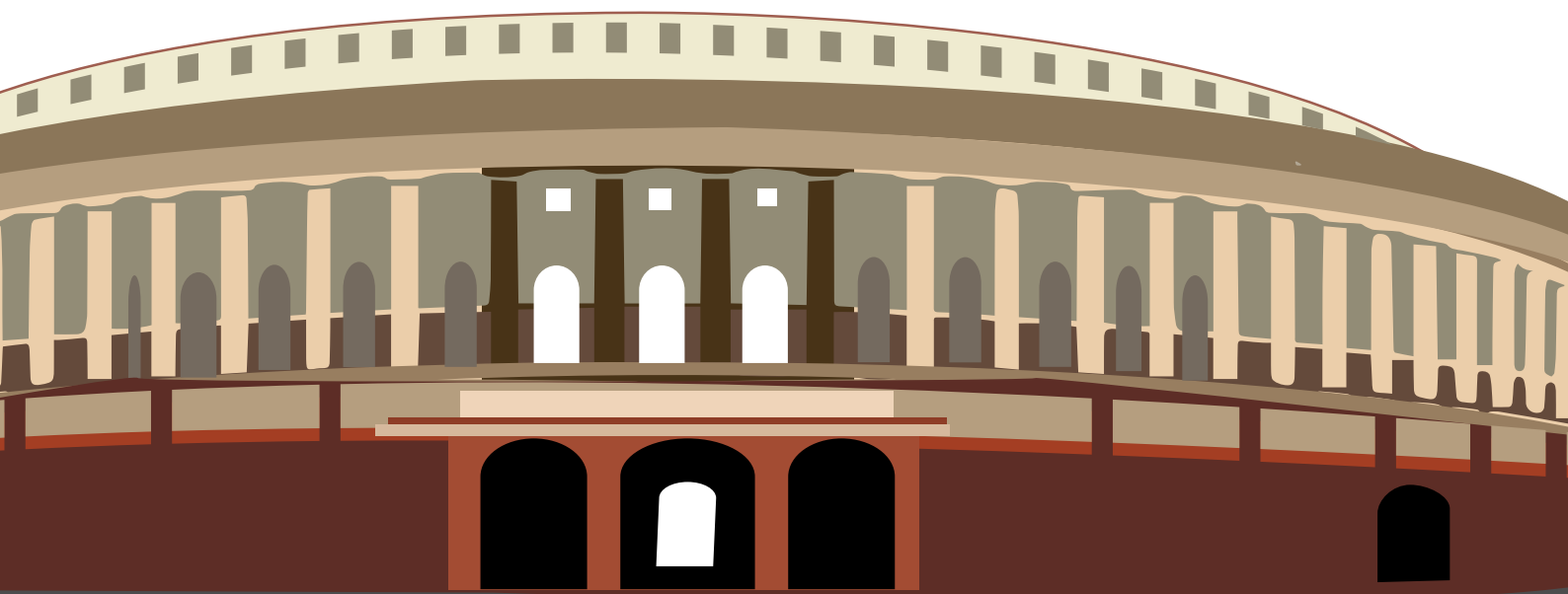
Tour 3- Pub crawl

- Vasant Kunj
- Aerocity and
- Cyber Hub

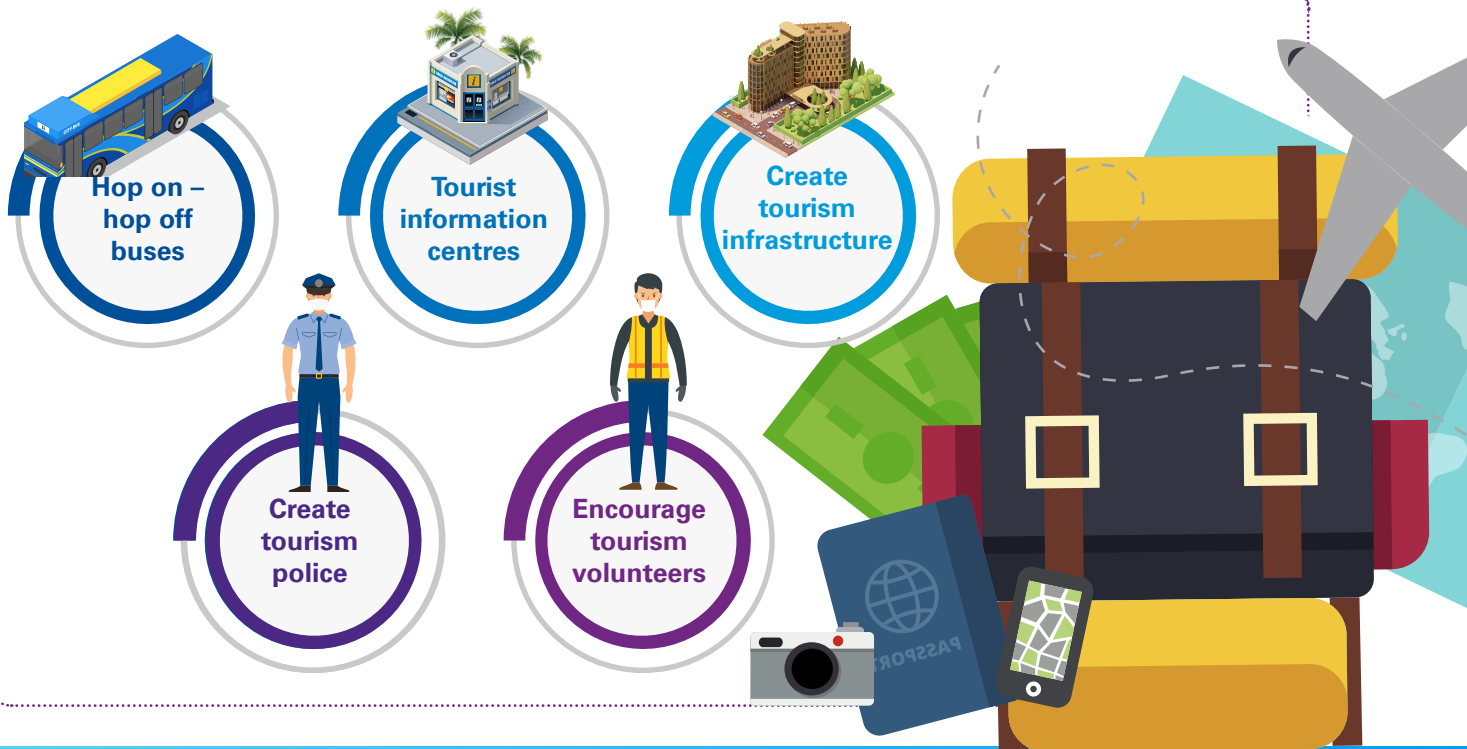


Key expectations from the government

In order to make any tourism-related endeavour a success, it will be essential to get support from the government authorities on multiple fronts. Some of the key asks are mentioned below:



Some other initiatives that can be taken by the DOT, Government of Delhi



Potential benefits of increase in tourism for Delhi

Growth in direct & indirect employment

Enhanced revenue for hospitality and other related sectors`

Increase in affiliated businesses such as supply chain, transportation and agriculture

More domestic and foreign spendings

Delhi's improved brand image both nationally and globally

**Infrastructure development in the city
Infrastructure development in the city**

Conclusion

Delhi has immense potential, much like Dubai, London and Paris to be one of the top tourism destinations in the world. Delhi possesses everything from a busy airport with excellent connectivity, both nationally and internationally, tourism products ranging from religious, cultural, heritage and modern and a bustling food and beverage options to name a few.

Despite all this, Delhi continues to underperform on its tourism capability, owing to factors discussed in the paper above.

We believe that a concerted effort, if taken cohesively by various stakeholders, such as the government, government agencies, private sector players such as hotels, restaurants, aggregators, etc. can go a long way in promoting and branding Delhi as a popular tourism destination for both domestic and international travelers.

In addition, various steps by the government, in the direction of image-building for Delhi in two important areas, i.e., safety and pollution, can go a long way in attracting tourists from all parts of the country and the world to Delhi.

The information contained herein is of a general nature and is not intended to address the circumstances of any particular individual or entity. Although we endeavor to provide accurate and timely information, there can be no guarantee that such information is accurate as of the date it is received or that it will continue to be accurate in the future. No one should act on such information without appropriate professional advice after a thorough examination of the particular situation.





About KPMG in India

KPMG in India, a professional services firm, is the Indian member firm affiliated with KPMG International and was established in September 1993. Our professionals leverage the global network of firms, providing detailed knowledge of local laws, regulations, markets and competition. KPMG has offices across India in Ahmedabad, Bengaluru, Chandigarh, Chennai, Gurugram, Hyderabad, Jaipur, Kochi, Kolkata, Mumbai, Noida, Pune, Vadodara and Vijayawada.

KPMG in India offers services to national and international clients in India across sectors. We strive to provide rapid, performance-based, industry-focused and technology-enabled services, which reflect a shared knowledge of global and local industries and our experience of the Indian business environment.



About CII

The Confederation of Indian Industry (CII) works to create and sustain an environment conducive to the development of India, partnering Industry, Government and civil society, through advisory and consultative processes. CII is a non-government, not-for-profit, industry-led and industry-managed organization, with over 9000 members from the private as well as public sectors, including SMEs and MNCs, and an indirect membership of over 300,000 enterprises from 294 national and regional sectoral industry bodies. For more than 125 years, CII has been engaged in shaping India's development journey and works proactively on transforming Indian Industry's engagement in national development. CII charts change by working closely with Government on policy issues, interfacing with thought leaders, and enhancing efficiency, competitiveness and business opportunities for industry through a range of specialized services and strategic global linkages. It also provides a platform for consensus-building and networking on key issues. Extending its agenda beyond business, CII assists industry to identify and execute corporate citizenship programmes.

Partnerships with civil society organizations carry forward corporate initiatives for integrated and inclusive development across diverse domains including affirmative action, livelihoods, diversity management, skill development, empowerment of women, and sustainable development, to name a few. As India marches towards its 75th year of Independence in 2022, CII, with the Theme for 2021-22 as Building India for a New World: Competitiveness, Growth, Sustainability, Technology, rededicates itself to meeting the aspirations of citizens for a morally, economically and technologically advanced country in partnership with the Government, Industry and all stakeholders. With 62 offices, including 10 Centres of Excellence, in India, and 8 overseas offices in Australia, Egypt, Germany, Indonesia, Singapore, UAE, UK, and USA, as well as institutional partnerships with 394 counterpart organizations in 133 countries, CII serves as a reference point for Indian industry and the international business community



KPMG in India contacts:

Vivek Agarwal

Partner

Government Advisory
Government and Public Services (G&PS)
E: vivekagarwal1@kpmg.com

Aalap Bansal

Director

Government Advisory
Government and Public Services (G&PS)
T: + 91 022 3090 2133
E: aalapbansal1@kpmg.com

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KPMG Assurance and Consulting Services LLP, Lodha Excelus, Apollo Mills Compound, NM Joshi Marg, Mahalaxmi, Mumbai - 400 011
Phone: +91 22 3989 6000, Fax: +91 22 3983 6000.

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