Emerging North East: Establishing North East India as Future Economic Hub
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<tr>
<td>YEAR</td>
<td>November, 2016</td>
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<tr>
<td>AUTHORS</td>
<td>North East Region - Initiatives (NER-I), YES Institute, YES BANK</td>
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Emerging North East: Establishing North East India as Future Economic Hub
North East India has the potential to become a key growth engine of the country. However, lack of investments and infrastructural development over the decades has resulted in low growth. This has shrunk employment opportunities in the state and coupled with lack of higher education facilities, migration from the region has increased.

Historically, the North East Region has been a pioneer in industrial development, owing to abundance of natural resources and its location advantage, with the region sharing almost 96% of its borders with other countries. The first oil refinery, the first tea plantation industries and the first coalfields can be attributed to Assam, but today, the region accounts for less than 2% of the country’s medium and large industries. Today, out of India’s export volume of about US $254.4 billion, the North East Region’s share is only about US $0.01 billion. The real challenge for the region lies in attracting investments. This can be achieved by adopting a two pronged strategy: providing a positive policy environment through innovative institutional structures, and ensuring that the spill-over is suitably tapped within an inclusive implementation framework, that works closely with the local communities to achieve on-ground synergies and maintain social equity.

Serious efforts are under way to improve the region’s accessibility, with developments like India’s longest rail-cum-road bridge across the mighty Brahmaputra at Bogibeel in Assam, development of 6,418 km. of highways with an investment of ₹33,688 Crores, and a broad-gauge rail link between Agartala and Dhaka, all of which are favourable for growth of SMEs, which are the key drivers to improve employment in the region. In most economies, over 90% of total SMEs are credited with highest rates of employment generation and account for a major share of industrial production and exports. Not only this, cottage industries of the region like handlooms and handicraft can also be upscaled through efficient supply chains, complemented with effective marketing and promotion strategies.

North East India is coming-of-age, with renewed interest in the high potential South Asian Trade Corridor, Tourism Circuits and Cultural Exchange. The forthcoming Union Budget needs to align regional aspirations with National, Asian and Global development perspectives, while improving connectivity, and adopt a socially and environmentally sensitive approach to Industrial Promotion.

At YES BANK, we have always followed a differentiated Knowledge Banking philosophy since inception to provide knowledge-based solutions to specific regions and sectors to enable India’s Social and Economic Development. With this in mind, YES BANK has also institutionalised a dedicated knowledge division - NERI – North East Region Initiatives, to focus on initiatives to realise the potential of North East India.

I am confident that this YES BANK report ‘Emerging North East: Establishing North East India as Future Economic Hub’, which highlights strengths and vast investment opportunities in the region, will act as useful reference for Industry, the Government and policy makers for long-term planning and development of the North East region.

Thank You,
Sincerely,

Rana Kapoor
Managing Director & CEO
Chairman
Emerging North East: Establishing North East India as Future Economic Hub

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Introduction
North East India is not only the most diverse, naturally resplendent resource rich region of the country, it has since millennia been the geographical and cultural loci bridging South East Asia and the Indian subcontinent. Flanked by China on the North, Myanmar on the East, Bangladesh due South, with Sikkim sandwiched between Nepal and Bhutan, 90% of the region’s borders are international, a strong testimony to the immense growth potential that these 8 states hold, strategically located between some of the fastest emerging economies across the globe.

From the lofty heights of the Himalayas to the massive riverine systems of the Brahmaputra, the North East region is a microcosm of the geographical diversity found in the rest of the country. The physiographic characteristics can be divided into three broad regions, viz. the Eastern Himalayas, the Brahmaputra-Barak plains, and the North East Hills. The Eastern Himalayas are one of the global biodiversity hotspots, home to many endemic and endangered species of flora, fauna and avifauna. Arunachal Pradesh harbours the northernmost lowland evergreen rainforests in the world, while Majuli in Assam, carved out by the Brahmaputra, is the largest river island in the world.

Not only is the North East Region (NER) a vibrant source of energy, oil, natural gas, coal, and limestone, it is also endowed with India’s largest perennial water system in the river Brahmaputra and its tributaries. The region is also rich in horticultural products, plantation crops, vegetables, spices, rare herbs, and medicinal plants, besides offering a plethora of tourism opportunities including rare flora and fauna, natural scenic beauty, unique performing arts, and varied cuisine and handicrafts.
Emerging North East: Establishing North East India as Future Economic Hub

The North East Region has long-established aesthetics of community led social and economic organization, and there is a need to synergize policy initiatives with these well established grassroots institutions capable of effective last mile delivery. Although the 45 million odd people of the North East Region make up only about 3.75% of the country’s total population (with almost 70% of it based in Assam), there are more than 200 ethnic groups and tribes that dot the landscape.

**Figure 1: North East India: Key Demographic Indicators**

<table>
<thead>
<tr>
<th></th>
<th>Arunachal Pradesh</th>
<th>Assam</th>
<th>Manipur</th>
<th>Meghalaya</th>
<th>Mizoram</th>
<th>Nagaland</th>
<th>Sikkim</th>
<th>Tripura</th>
</tr>
</thead>
<tbody>
<tr>
<td>Area ('000 sq km)</td>
<td>83.743</td>
<td>78.438</td>
<td>22.327</td>
<td>22.429</td>
<td>21.081</td>
<td>16.579</td>
<td>7.096</td>
<td>10.486</td>
</tr>
<tr>
<td>Population Density</td>
<td>17</td>
<td>397</td>
<td>122</td>
<td>132</td>
<td>52</td>
<td>119</td>
<td>86</td>
<td>350</td>
</tr>
<tr>
<td>% of Rural Population</td>
<td>77.33</td>
<td>85.92</td>
<td>67.79</td>
<td>79.92</td>
<td>48.49</td>
<td>71.03</td>
<td>75.03</td>
<td>73.82</td>
</tr>
<tr>
<td>Literacy Rate</td>
<td>65.38</td>
<td>72.19</td>
<td>79.21</td>
<td>74.43</td>
<td>91.33</td>
<td>79.55</td>
<td>81.42</td>
<td>87.22</td>
</tr>
</tbody>
</table>

Source: Basic Statistics of North East Region 2015, North East Council Secretariat

The North East Region has long-established aesthetics of community led social and economic organization, and there is a need to synergize policy initiatives with these well established grassroots institutions capable of effective last mile delivery. Although the 45 million odd people of the North East Region make up only about 3.75% of the country’s total population (with almost 70% of it based in Assam), there are more than 200 ethnic groups and tribes that dot the landscape.

**Figure 2: GSDP in Crores ₹ at Constant Prices**

Source: Ministry of Statistics & Programme Implementation
Connectivity, communication and access to energy remain some of the key focus areas that can bring in sustained growth into the region. The region is also getting a dedicated digital hub with direct sea links to meet the bandwidth demand, and the budget needs to set the tone to set the ball rolling on creating the necessary financial and infrastructural ecosystem. After organic farming, it is also poised to lead the way in renewable energy in India.

Social and Impact investments are also on the rise, and with a stable government at the centre, private equity is set to grow in the North East, especially in sunrise sectors like Infrastructure, Energy, Agriculture & Agribusiness, Tourism & Hospitality, Sports, Culture, Education & Skill Development and Smart Cities. India is well poised to be one of the biggest start-up ecosystems in the next 5 years, and the marginal rise in exits by PE funds augurs well for the economy, with fresh infusion of foreign capital by a newer set of PEs.

India’s growth trajectory in the 21st century will inarguably be defined in a major way by the North East Region (NER), and as we usher in a new era of inclusion and International Relations in South East Asia and ASEAN regions, the time has come to work steadfast on realizing the vision of the ‘Act East’ policy, and spare no expense in ensuring a dynamic policy environment backed by a strong implementation intent. This report aims to briefly identify the key growth sectors which would drive the region’s pivotal role in India’s next era of growth.
A. Infrastructure and Industry

The Indian Government has announced the ambitious plan of building more than 4,000 kms of roads and highways in the North East Region enhancing connectivity with rest of India and also critically with South East Asia and ASEAN countries. The Special Accelerated Road Development Programme for the North East (SARDP-NE) has proposed an investment of ₹ 35,000 Cr in developing the Trans-Arunachal highway and connecting all district headquarters by 2-lane highway. Ministry of Road Transport and Highways has recently sanctioned surface transport projects worth over ₹ 1 lakh Cr, covering National Highways, road over-bridges and waterways.

Table 1: Road Density in North East

<table>
<thead>
<tr>
<th>States</th>
<th>Road density/1000 Sq Km</th>
<th>Road density/1000 population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arunachal Pradesh</td>
<td>196.96</td>
<td>13.77</td>
</tr>
<tr>
<td>Assam</td>
<td>2936.51</td>
<td>7.83</td>
</tr>
<tr>
<td>Manipur</td>
<td>739.11</td>
<td>6.98</td>
</tr>
<tr>
<td>Meghalaya</td>
<td>438.67</td>
<td>3.89</td>
</tr>
<tr>
<td>Mizoram</td>
<td>292.11</td>
<td>6.35</td>
</tr>
<tr>
<td>Nagaland</td>
<td>1345.32</td>
<td>10.27</td>
</tr>
<tr>
<td>Sikkim</td>
<td>263.95</td>
<td>3.17</td>
</tr>
<tr>
<td>Tripura</td>
<td>3026.23</td>
<td>9.09</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>965.73</strong></td>
<td><strong>2.77</strong></td>
</tr>
</tbody>
</table>

Source: Ministry of Road Transport and Highways
Japan has also expressed intentions to provide ODA (Overseas Development Aid) loans for the improvement of road network connectivity in Northeastern states of India. The Centre’s initiative to tie up with Japanese International Cooperation Agency (JICA) to widen the 71.5 km road from Shillong to Dawki has gained momentum. The 3,200 km long India-Myanmar-Thailand (IMT) highway project has also received an aggressive foreign policy impetus and work is progressing at a fast pace. The Kaladan Multimodal Project connecting Mizoram to Sitewe Port has also been sanctioned with a revised estimate of ₹ 2,904 Cr. The roadways sector in North East will continue to experience high growth of short to medium terms given the region’s immense need and strategic location.

Railways is another key mode of transport for the rest of India but its footprint in the North East Region has been on the lower side, despite the fact that the first railways came to the region as early as 1881. The Railway Ministry has taken this up on priority, and multiple projects are underway to put all NE state capitals and major trade centres on the rail map. The railway budget has increased the allocation of the Northeast Frontier Railway (NFR) from ₹ 35,065 Cr. to ₹ 40,000 Cr.

Air connectivity has also grown in the last decade. Most of the capital cities are either connected directly or to nearby major airports through a hub-and-spoke model. Assam government has recently signed a MoU with the Ministry of Civil Aviation, Government of India and Airports Authority of India under Regional Connectivity Scheme (RCS) – UDAN. Under RCS, the Central Government shall provide 90% share of VGF (Viability Gap Funding) to Assam. In addition, Central Government shall provide concessions on Service Tax on tickets.

### Table 2: Rail coverage in North East

<table>
<thead>
<tr>
<th>States</th>
<th>Route (Km)</th>
<th>Total State Area (Sq. Km)</th>
<th>Route km per 1,000 Sq. Km</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arunachal Pradesh</td>
<td>1.26</td>
<td>83,743</td>
<td>0.02</td>
</tr>
<tr>
<td>Assam</td>
<td>2,283.71</td>
<td>78,438</td>
<td>29.11</td>
</tr>
<tr>
<td>Manipur</td>
<td>1.35</td>
<td>22,327</td>
<td>0.06</td>
</tr>
<tr>
<td>Meghalaya</td>
<td>0</td>
<td>22,429</td>
<td>0</td>
</tr>
<tr>
<td>Mizoram</td>
<td>1.50</td>
<td>21,081</td>
<td>0.07</td>
</tr>
<tr>
<td>Nagaland</td>
<td>12.85</td>
<td>16,579</td>
<td>0.78</td>
</tr>
<tr>
<td>Sikkim</td>
<td>0</td>
<td>7,096</td>
<td>0</td>
</tr>
<tr>
<td>Tripura</td>
<td>151.40</td>
<td>10,492</td>
<td>14.43</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>2,452.07</strong></td>
<td><strong>2,62,185</strong></td>
<td><strong>9.35</strong></td>
</tr>
</tbody>
</table>

Source: Ministry of Railways

The Central Government is also planning to launch a new airline based out of Guwahati to connect all NE state capitals. A subsidiary of Pawan Hans Helicopters Ltd, it will have an equity base of ₹ 150 crore, will be 51% owned by Pawan Hans Helicopters Ltd and the rest by North Eastern Council (NEC).

Inland waterways are an area where North East region has immense potential to take the lead. Two national waterways: NW2 (Brahmaputra) and NW6 (Barak) flow through the region. As compared to Bangladesh’s 32% cargo movement through Inland Water Transport (IWT), the figure for Assam is only 3%, highlighting the immense potential the region has for developing domestic as well as international IWT corridors.
Industry and services contribute over 25% and 50% respectively to the region’s GDP. The manufacturing sector registered an annual average growth of 6.9% during 2005-06 to 2011-12, as against 9% average growth registered for India as a whole. Further, the contribution of the manufacturing output from the region to the total manufacturing output of the country is low at around 1.2%. There has not been much growth in large-scale industries and the industrial sector in the region primarily consists of small and medium enterprises. Most of the large industries are based in Assam related to refining, cement, chemical and fertilizers, paper and paper products. Food processing is also one of the fastest growing segments in the region.

### Table 3: Industrial Infrastructure in North East

<table>
<thead>
<tr>
<th>State</th>
<th>Industrial Estate</th>
<th>Growth Centre</th>
<th>Integrated Infrastructure Development Centre (IIDC)</th>
<th>Industrial Areas</th>
<th>Export Promotion Park</th>
<th>Border Trade Centers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arunachal Pradesh</td>
<td>12</td>
<td>0</td>
<td>5</td>
<td>4</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Assam</td>
<td>16</td>
<td>11</td>
<td>11</td>
<td>17</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>Manipur</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>Meghalaya</td>
<td>6</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Mizoram</td>
<td>8</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Tripura</td>
<td>6</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>0</td>
</tr>
</tbody>
</table>

Source: Ministry of Micro, Small & Medium Enterprises

It is proposed that 53 development nodes should be set up across the region in tandem with the development of highways and railways. Further, 20 more nodes can be set up along the two major IWT routes of the Brahmaputra and Barak rivers. Infrastructure development along these development nodes is expected to bring in cumulative investments of ₹ 42,500 Crore over the next 15 years. Around 70% of the investment is expected to be in Assam, Arunachal Pradesh and Meghalaya.

### B. Energy

Owing to the topography and geographical characteristics of the region, a large part of hydropower potential of the country is concentrated in the North East Region including Arunachal Pradesh, which has come to be known as the “future powerhouse of the country”. The region has a maximum potential of 93.1% of the total capacity to be developed followed by North India at 60%. Although some regions need to be exempted due to environment concerns and international disputes, there is still immense opportunity to meet ever increasing household and industrial demand through smaller projects. The total hydropower potential of the region is estimated at over 58,971 MW.¹

Integrated hydroelectric projects also have the potential to support the provisions of irrigation and drinking water, as well as

¹ [www.mdoner.gov.in/node/1306](http://www.mdoner.gov.in/node/1306)
assist in flood control measures. In face of the above challenges, both the central and state governments have tried to evolve a regional hydro-development plan including the 50,000 MW announced in 2003 and North Eastern Industrial and Investment Promotion Policy 2007.

The Hon’ble Prime Minister is soon expected to launch the 1200 MW Teesta Stage III Hydro Electric Project (HEP), all 6 units of which are expected to be ready for commissioning by December 31, 2016. Once completed, it will be the second largest hydro project in the country and largest hydro electric project constructed in India on a Public Private Partnership (PPP) mode.

The North East Region is also poised to be a major hub for Renewable Energy. Six cities - Guwahati and Jorhat in Assam, Kohima and Dimapur in Nagaland, Itanagar in Arunachal Pradesh and Agartala in Tripura - will be developed under the Development of Solar Cities Programme of the Ministry of New and Renewable Energy (MNRE).

A 5 MW solar power project, the first its kind in north-east India, has been commissioned by North East Electric Power Corporation (NEEPCO) at Monarchak in Sipahijala district of Tripura in February 2015. The plant is run by the North Eastern Electric Power Corporation (NEEPCO) and solar hot water systems are to be set up in hotels, nursing homes, hostels, government guest houses, hospitals and shopping centres as part of the city’s solar master plan. NEEPCO plans to generate at least 1,500 MW of power from renewable energy in the Northeast by 2020 under the United Nation’s Clean Development Mechanism (CDM) initiative. NEEPCO has plans for another 5 MW solar plant at Hojai-Lanka in Assam and a 2 MW windmill in northern Arunachal Pradesh.

The per capita power consumption in NER is around 249 KWh, less than half of the national average of 778 KWh, signaling the immense appetite for power that would translate into healthy consumer demand if the region can develop the immense potential that it holds for both conventional and renewable sources of energy.

C. Agriculture & Agribusiness

Agriculture employs 70% of the region’s population presenting an excellent opportunity for agribusiness and as such requires private capital as well as policy intervention from the central and state governments. The region has a traditional advantage of using little to no chemical inputs; organic farming is therefore a big opportunity that ought to be utilized to promote exports. Indeed, National Horticulture Mission has been actively involved in promoting fruit production and there has been a pickup in propagating brand “Organic”.

Local and private entrepreneurship must be encouraged and incentivized by states in this region to setup logistics and marketing infrastructure, the lack of which is a major hindrance to economic development of the region. Limited road and rail connectivity, lack of primary processing units and poor storage, transportation and marketing infrastructure has been bogging the region despite its immense potential to act as an economic hub for agricultural produce. Fruits, vegetables, spices, medicinal plants and value added processed products ought to be the main focus of the region. Given the exponentially growing demand from urban markets in India as well as the countries neighbouring the North East Region for premium horticulture produce and meat, supply chains focusing on these select products ought to be developed.

A summary of the current scenario and opportunities in each of the states is given below:

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2 Value Chain Analysis Of Select Crops In North East States, SFAC
Assam: Assam connects NER with the rest of India and also offers great trade potential with bordering countries of Bangladesh, Bhutan and Nepal. Rich in water resources and fertile land, the state is endowed with five distinct agro-climatic zones - North Bank Plain Zone, upper Brahmaputra, central Brahmaputra, lower Brahmaputra and Barak valley. Assam grows 60% of the total horticultural produce in the north east including 2 million tonnes of fruits and 4.4 million tonnes of vegetables. Major crops include Banana, Potato, Vegetables, Lemon, Orange, Areca nut, Jackfruit, Pineapple and Litchi and Guava.

There is significant scope for promoting antioxidant rich organic black rice native to the region as an exotic, healthy grain in premium domestic and export markets. Amongst flowers, Rose, Gladiolus, Tuberose are well suited to grow in Kamrup, Nagaon, Silchar, Jorhat and Tezpur clusters. The government has already notified an agri export zone for fresh and processed ginger in eight districts including Kamrup, Nalbari, Barpeta, Darrang, Morigaon, Nagaon, Karbi Anglong and North Cachar hills.

Mizoram: Bordering Myanmar and Bangladesh, Mizoram offers a gateway for engaging in international trade with Southeast Asian countries. The agriculture sector & allied activities contributed 17.5% (2014-15) to the GSDP with 60% of the population dependent on agriculture for their livelihoods. The state shows great potential for promoting floriculture, horticulture, fisheries and Bamboo. Comprising of three agro-climatic zones of temperate, subtropical and tropical zones, Mizoram is well placed to cultivate and export passion fruit, pineapple and citrus. Mizoram also produces grapes mainly in the off season which has higher productivity than the national average as well as that of Maharashtra which is the main grape production belt. A feasibility study must be carried out to assess large scale adoption of grape farming across seasons.

India accounts for 26% of the world’s ginger production and NER produces 53.8% of India’s ginger production. Ginger is an important FOREX earner for India and despite low yields a ginger surplus Mizoram (constituting 4% of India’s produce) has potential to develop processing industries for ginger which can be used in confectionary, medicinal extracts or beverages. High gingerale consumption in China and South East Asia offers another avenue to be explored. Mizoram also grows 11% of India’s flowers. Aizawl, Lunglei and Kolasib are flower belts particularly well suited to heavily promote Rose, Anthurium, Gladiolus – all three fetch good premiums in both domestic and export markets. The NE states account for 65% of India’s Bamboo production value and 20% of the global production value. With bamboo forests covering 31% (6,446 sq km) of Mizoram’s geographical area, Mizoram alone contributes to around 14% of the country’s bamboo production. The state is setting up an SEZ at Khawnuam village in Champhai which is an excellent opportunity for Bamboo and related industries.

Arunachal Pradesh: Largest among the seven sister states, Arunachal Pradesh provides immense opportunities for trade with its bordering countries - Myanmar, Bhutan and China. The state enjoys diverse climates from subtropical to temperate and thus has potential for both floriculture and horticultural crops, particularly orchids, kiwis and apples. Arunachal Pradesh is home to 601 species of orchids, or 52% of the species of orchids known in India. Ziro Hapoli, Tawang, Itanagar and Namsai have been specially identified as flower belts to grow Cymbidium orchid. The state also produces nearly 11% (1,09,180 tonnes) of India’s total aromatic plants which offer great export value. The piggery industry in India is

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3 National Horticulture Board, 2015  
4 Economic Survey 2015-16, Government of Mizoram  
5 FAO Data, 2013  
6 National Horticulture Board, 2015  
7 National Horticulture Board, 2015  
8 North East Summit, Indian Chamber of Commerce  
9 Planning and Programme Implementation Department, Government of Mizoram  
10 India Brand Equity Foundation  
11 National Horticulture Board, 2015
also at a nascent stage with over 60% of the country’s consumption occurring in North East followed by metros. Arunachal Pradesh offers a natural potential for pork industry. With proactive activities in animal husbandry best practices, small farmers across the state can be trained and engaged for contract farming and rearing of pigs. Neighboring states of Myanmar and China may prove excellent markets for meat exports.

**Manipur:** Situated in the eastern-most corner of India, the state shares its border with the neighbouring Myanmar through the town of Moreh which is the lone feasible land route for trade with Myanmar and other Southeast Asian countries. Manipur enjoys abundant rainfall and three distinct temperate subalpine, mild tropical hill and mild tropical plain climates. Around 50% of the total crop area is under fruit cultivation producing about half a million tonnes of fruits (of which 26% area is under pineapple only) whilst another 30% area grows vegetables and about 10.5% area is devoted to spices. With a conducive environment, there is potential to export a significant portion of the 13,600 tonnes pineapple and 96,000 tonnes citrus fruits that the state produces. Manipur also produces around 99,000 tonnes of passion fruit. While passion fruit is mainly used in the juice industry, it has great potential to be offered domestically as a fresh fruit in premium urban consumption markets such as Kolkata, Delhi NCR and Mumbai. Passion fruit extracts also finds use in the cosmetics industry and is exported to neighbouring Myanmar. Additionally, with only 800 hectares under floriculture, there is major scope to bring a larger area under flowers. Gladiolus and Anthurium are both well-suited to be grown in Imphal, Thobal and Senapati clusters.

**Meghalaya:** The state shares its border with Assam in north and east and with Bangladesh in south and west. The state has both mild tropical plain and mild tropical hill zones making it suitable for large scale pineapple, pear, pepper, cashew, potato, flower and vegetable production. Higher altitudes and off season potential to grow vegetables gives Meghalaya a unique position to become an off-season vegetable hub for distant markets. Cabbage and cauliflower productivity in the state is much higher than the national average which may offer potential for processed cut vegetables. However, to leverage on strategic advantages, there is urgent need to upgrade post-harvest infrastructure and invest in modern vegetable pack houses. Among the North Eastern states, Meghalaya is among the key suppliers of cut flowers to the rest of India amounting to more than 2,600 tonnes. The areas around Shillong and Barapani are particularly well suited to grow Orchids, Carnations, Gladiolus and Lilium.

**Nagaland:** Bordering Myanmar to the east, Nagaland enjoys sub-tropical and mild tropical hill zones climate making it suitable for growing pineapples, banana, citrus fruits and ginger. Excellent quality, five-fingered, low-fibre ginger grown in the state make it highly suitable for exploring opportunities in processing. Both Cymbidium orchid and Gladiolus are suitable to be grown in Wokha, Dimapur and Mokokchung clusters. Bhut Jolokia also known as Naga King Chilli grown across Dimapur, Peren & Kohima clusters has found acceptance in metropolitan markets which are ready to pay premium to cover its air transportation costs.

**Tripura:** Bound from the north, west and south by Bangladesh, Tripura offers great potential for cross border trade. The state mainly grows coffee, pineapples, jackfruits, mandarin oranges and cashew nuts. The state has significant potential to trade with Bangladesh in pineapples, jackfruits and vegetables. High pineapple, cauliflower and cabbage productivity of the state provides great rationale for establishing processing units as well as appropriate post-harvest infrastructure.

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11 Industry estimates
12 National Horticulture Board, 2015
13 National Horticulture Board, 2015
14 National Horticulture Board, 2015
15 National Horticulture Board, 2015
16 National Horticulture Board, 2015
17 National Horticulture Board, 2015
Sikkim: Surrounded by Tibet in the north, Bhutan in the east and Nepal in the west, Sikkim has been officially declared as an organic state. Varied agro-climatic conditions provide ample opportunity for growing rice, maize, urad, mustard, soybean, mandarin orange, potatoes, peas, large cardamom, ginger and turmeric (spices). However, mandarin and passion fruit are the two most promising fruits in terms of cultivation and exports. Export oriented organic farming in the NE region ought to be made policy priority and will require strong processing infrastructure, quality control, certifications and branding.

D. Tourism & Hospitality

A place renowned for its magical beauty and bewildering diversity, North East India is the home to more than 45 million people i.e. about 3.76% of India’s total population.\(^{18}\) India’s North East Region is endowed with huge untapped natural resources and is acknowledged as the country’s Gateway to South East Asia. The states comprising the NER, while unique in most respects, have similar economic and geographical attributes that merit special policy interventions. While the total number of tourist visits in India amounted to 14553 lakhs in 2015, the share of North Eastern States amounted to 80.59 lakhs. A huge chunk of tourism in the region comprises of domestic tourists with 79.40 lakhs of domestic tourists visited in 2015 while the numbers are relatively small in case of foreign tourists which was only 1.18 lakhs.

Figure 4: Domestic tourist arrivals in NE States (lakhs)

![Figure 4: Domestic tourist arrivals in NE States (lakhs)](image)

Source: Ministry of Tourism

Figure 5: Foreign Tourist arrivals in NE States (lakhs)

![Figure 5: Foreign Tourist arrivals in NE States (lakhs)](image)

Source: Ministry of Tourism

Challenges to North East Tourism:

North East India offers plethora of opportunities in almost all major areas of tourism such as ecotourism, adventure, wildlife, wellness tourism amongst others. However, at the same time a lot needs to be done to tap these. Some of the key issues and challenges hampering the tourism growth of the region are as under:

- **Accommodation Facilities:** The largest concentration of hotels and resorts in the region are in Guwahati and Kaziranga followed by Dibrugarh, Jorhat, Tinsukia and Silchar.\(^{19}\) It has only one five star hotel in Guwahati and three more are coming up.\(^{20}\) Except for Guwahati, the hospitality industry in rest of the North East is dominated largely by local players with smaller inventories and limited tourism offerings. Shortages of big land parcels at ideal locations, land ownership issues, logistical issues amongst others are the impediments towards the growth of the industry.

- **Tourism Infrastructure:** One of the primary reasons hindering the growth of the tourism industry is the lack of adequate or quality roads, air and riverine connectivity with the rest of the country as well as neighboring countries. Poor road quality, lack of feeder stations, limited network of national road and highways are few to name. The recently announced plans of awarding road projects of 1 lakh crore in the North East in next 5 years,\(^{21}\) plan to bring all capitals of the NE India on the railway infrastructure map by 2020\(^{22}\) amongst others are all well directed towards development of infrastructure. Time bound implementation of the ongoing projects, development of road signage, adequate parking spaces, availability of tourist cars, tourist information centers, wayside amenities amongst other would be crucial to the future of region as tourism hotspot of the country.

- **Marketing and Promotion:** Proper marketing and promotion of North East India as a major tourist destination is most important for the industry. Local Governments in association with the Ministry of Tourism need to work on an integrated marketing strategy to showcase the rich scenic beauty, exotic flora and fauna, diversity in culture of the NE. Further identifying new tourism concepts like wellness tourism, adventure tourism, agri-tourism, rural tourism, and building new tourist circuits along with proper marketing push are pre-requisites for the sector to develop and flourish.

- **Safety and Security:** Safety and Security is of paramount importance and has been a major concern for growth of tourism in North-East. Insurgencies and ethnic violence in the region have adversely affected sentiments of the tourists over the years. The industry needs to take measures to make the environment more secure like building police stations and deployment of tourist polices. These special tourist police will be responsible for overall safety and security of tourists by guiding them on safe lodging and transportation, effective handling of enquiries and complaints, regular surveillance and prompt action in case of any misconduct.

- **Accessibility:** Many places in the North East Region require a protected area permit (PAP) & Inner Line Permits (ILPs) to explore Arunachal Pradesh and certain parts of Sikkim. Restricted Area Permits (RAPs) has been eased in 2013 for the states of Manipur, Mizoram and Nagaland. There is a need to ease the special permits to enter the restricted areas of certain state of north east.

\(^{19}\) Analysis conducted by FICCI, 2015  
\(^{22}\) http://indiatoday.intoday.in/story/seven-sisters-to-be-brought-on-railways-map-soon/1/668476.html
Recommendations

The North Eastern part of India holds immense opportunities for tourism which can be realized through collaborative efforts from the government and private sector. Challenges around tourism infrastructure need to be addressed simultaneously coupled with aggressive marketing and promotional campaigns for tourism to flourish in the region.

- **Ownership of Land**: Apart from locals, other Indians cannot purchase land in most of the states of the North Eastern Region. This condition needs to change to attract big ticket investments

- **Tourism Infrastructure**: Amenities available at various destinations need to be improved. These include basic amenities such as drinking water, well maintained and clean waiting rooms and toilets, first aid and wayside amenities such as lounge, cafeteria, and parking facilities, amongst others

- **Environment**: There is an urgent need to incorporate a sustainability perspective in tourism development plans/projects to prevent the kind of environmental degradation that has taken place at Assam, Manipur and Mizoram. Effective implementation of NE ecotourism guidelines and identification of ‘eco-sensitive’ areas and adherence to Disaster Management Guidelines while planning will be imperative for sustainable environment management

- **Dedicated Tourism Development Authority for the North Eastern Region**: A separate Tourism Development Authority should be created for implementation of tourism master plan including development of interstate circuits

- **Promotion of Niche Tourism Products**: Promote Adventure Tourism connecting key tourism hubs of the region and neighboring countries and Wellness Tourism by identifying locations which can be home to a vast number of spas, health resorts, fitness centers, yoga retreats etc

- **Skill Development**: A growth in tourism will lead to growth in the hospitality sector. This region has a large population that finds employment in the hospitality industry across India and outside. There are thus opportunities for leveraging the local talent by setting up training institutes in hospitality sector.

- **Marketing & Promotion**: Aggressive marketing and promotional strategy need to be adopted across North Eastern Region by the State Governments. Maximum utilization of social media, digital marketing, mobile based apps, participation at major national and international fairs amongst others is imperative to promote the region

**E. Sports**

Given the distinct socio-economic and geographical aspects of NE India, the Sports sector has a crucial role to play in mainstreaming regional growth, and Sports Tourism has immense potential to not only generate livelihoods, but also create business opportunities that ensure Social Equity in Public Private Partnerships (PPP), and foster education, peace and harmony.

The north eastern states have a long tradition of excelling in sports. Assam has a robust sports infrastructure with the presence of stadia such as the Indira Gandhi Stadium, Sarusajai which has a capacity of 30,000 spectators. The key sports played in the North East include Athletics, Badminton, Hockey, Football, Judo, Table-Tennis, Weightlifting and Boxing. The Sports Authority of India has developed a structured plan for infrastructure and the Ministry of Sports and Youth Affairs is diverting substantial funds to the cause. The SAI North-Eastern Regional Centre was established at Takyel, Imphal on 15th September, 1986 on 64
acres of land and covers the States of Manipur, Mizoram and Nagaland. Private sector interventions in the region have also seen a healthy growth over the years, which not only feed into the funding gap, but also support long term development plans to churn out internationally competitive athletes.

**Recent Government Initiatives for Sports Development in North East India**

1. **12th South Asian Federation (SAF):** This mega event in February 2016 pitched the North East region as a serious sporting hub for not only India, but the larger South East Asian region as well. The Centre spent nearly ₹350 crores to upgrade sporting facilities, roads and the security infrastructure for this event which witnessed participation from nearly 4,500 athletes and officials from SAARC nations and beyond.

2. **Himalayan Region Sports Festival (HRSF):** The Department of Sports has formulated Himalayan Region Sports Festival (HRSF) for promoting unique sports traditions in the Himalayan Region, which includes Nepal and Bhutan and Indian states such as J&K, Uttarakhand, Himachal Pradesh, Sikkim and the North Eastern States. In the sports competitions to be conducted under HRSF, all the North Eastern States, Himachal Pradesh, Jammu & Kashmir, Uttrakhand and the neighboring countries such as Nepal and Bhutan will participate. These competitions will promote various indigenous games as also team spirit between the hilly states of the country and regional cooperation in the area of sports with neighboring countries.

3. **Revision of scale of assistance to Sportspersons and National Sports Federations:** Air travel has been allowed for coaching camps and competitions held in the North East Region. Similarly, the athletes from the North East Region will be allowed air travel from their residence/coaching camps to and from Kolkata.

4. **North East Sports Festival (NSF) scheme:** The North East Sports Festival (NSF) scheme was launched in the year 1986-87 to broad-base games and sports in the North-eastern states and to tap the hidden talents in the area. Under the component, North East sports festival is organized involving sports persons from the North East states every year. The sports disciplines which are very popular in the region are included in the festival.
Social Equity Model for Development of Sports in the North East

The Social Equity Model derives itself from the basic Public Private Partnership (PPP) approach for the infrastructure sector that is based on Build-Operate-Transfer. However this model attempts to holistically include the community as an active project partner. This model represents a shift away from the regular grant and subsidy model to a social equity model that is based on PPP, implicitly trying to make it more sustainable in the long run.

Most often, this equity would also need to be provided directly or indirectly by the public agency; however ultimately it will be the individual members of the concerned community who will have stake in the project.

The raison d’être of the social equity model is to involve the community in the process of development in order to assure sustainable and inclusive development. The model focuses on involvement of all the stakeholders and provides positive returns to all of them. By having stake in the project, the community is assured of being involved in the decision making and hence assured that all the policies of the project directed towards their wellbeing. Sports infrastructure development on these lines can address several of the society driven hurdles and challenges faced today by the region.

Any sports development model in the North East needs to have a strong community linkage. The following tenets define the contours on which the model can rest.

- The community can participate in sport projects by entering into agreement with the promoter and forming a part of the SPV by providing part/whole of the required land for the facility
- The agreement would also ensure that the community has a say in the running and management of the facility so as to protect their rights and ensure correct use of land
- The children of that community would also be given admission to the facility at a discounted rate
- It would be most prudent if the sports facility were linked with the nearest educational institute thereby catering to an assured clientele

F. Culture

India’s North Eastern Region, also addressed through the sobriquet, the land of the seven sisters, is a region that has been aptly described as an unexplored paradise. While each state is more beautiful than the other, each with its own cultures and beliefs stands out. Because of the regions inaccessibility from the rest of world, it has been lucky enough to maintain most of its natural diversity.

A land of many indigenous tribes and religions, the communities across this geographical territory, all of them live a lifestyle that is simple and in close relation to nature. The people of the North-East live a very simple life, all the various tribes and cultures still live in accordance to the environment, and nature plays a very big role in their survival. It is indeed said that a trip to North-East remains incomplete if one doesn’t witnesses these many distinct tribes.

With an incredible cultural diversity of more than 250 tribes and sub-tribes which trace their ancestry to distant lands in Mongolia and Southeast Asia, it is important to address these indigenous cultures. With the advent of modern science, the recent decades have seen urban influence penetrating even the lives of those who remain far away from cities. The same applies in Northeast India. The indigenous people of the region, who occupy remote frontiers consisting of rainforests and Himalayan mountains, have
been witnessing the advent of roads and urban goods into their territory which only twenty years back appeared forbidden to the outside world. The cultures and customs have stood of time and the besides minor transitions continue to wear the pride associated with the anthropological group. The tribe has a rich traditional knowledge and still adheres to many of their indigenous ways.

The land also boasts of housing the Buddhist circuit, with numerous holy monasteries making this region a sacred environment. This is a region that reveres in protection of the environment hosting breakthrough initiatives such as eco-tourism, believing in sustainable co-existence. The communities in even remotest locations understand the gravity of climatic changes and have united in several initiatives to achieve ecological balance. Bamboo, considered a natural capital asset owes its growth story to the region of north east. The humid climate with its rich biodiversity has given creative expression to their material culture. The landscape which is mostly agrarian sees abundant skills of handloom weaving and sericulture, making villages self-sufficient in food, clothing, shelter. The Vrindavani Vastra, a 15th century Vaishnavite silk scroll with episodes from life of Vishnu, is an outstanding example of their weaving expertise. Traditional bamboo baskets and other lifestyle products have evolved through centuries of cultural and functional mediation and are response to a variety of local needs that have been ingeniously satisfied by the local craftsmen.

Weaving and sericulture is integral to the culture and economy to part of north east region, namely muga, the golden silk and eri, ahimsa silk, with geographic indicators of these techniques belonging to them. These regional specialties bring value and pride to the various states and the respective craft clusters.

North Eastern Region is opening its doors steadily to celebrate its culture in form of contemporary music, dance, and natural heritage through the platform of regional festivals. The festivals are a dazzling mélange of cultural performances, art & crafts, sports, food fairs, games and an unforgettable adventure of exploring the hidden world of tribal culture, and lifestyle of India’s North East, a paradise to be discovered. Sangai and Hornbill are two of the most exotic colourful cultural festivals celebrated in one of the most unexplored and pristine parts of the world. Sangai, in November, and Hornbill, in December, are celebrated in the pristine unexplored states of Manipur and Nagaland respectively. Cherry Blossom Festival is also being hosted in Shillong, the capital of Meghalaya to venerate and display its natural beauty strengthening prospects of tourism and economic growth.

G. Youth Empowerment & Skill Development

North East Region has the outstanding advantage of demography and natural resources and with the support of integrated planning and collaborative approach between the state and the center; these states can become hub of activity and economic development. While there are a number of schemes running in the region, it needs a focal plan to do sustainable skill development in the region that involves the natural advantages of the region. New age options like renewable energy, entrepreneurship development, designing and internet of things are few options that can also be pursued without the youth actually migrating from the area.

The key sectors in skill development currently under focus are construction, tourism, entertainment, agro and food processing, power especially hydro power, logistics and transport. With the region having quite a good literacy rate, the unemployment rates of the states need serious speculation.
Emerging North East: Establishing North East India as Future Economic Hub

Figure 7: Literacy Rate of NER

![Literacy Rate of NER (%)]

Source: Provisional Population Paper 1 & 2 - Census 2011

However, the unemployment rate however remains quite high:

Figure 8: Unemployment Rate (per 1000) for Persons of Age 15 years & above

![Unemployment Rate (per 1000) for Persons of Age 15 years & above]

Source: National Sample Survey Organization (NSSO)
Several training partners, academic institutions and vocational training centers are actively involved in a range of programs that enable livelihoods, increase productivity and income levels of people in the states. Most initiatives are a part of national schemes like PMKVY and DDU-GKY apart from regional schemes from the states.

**Current Developments in the North East Region**

**Arunachal Pradesh**
- Under the 12th Plan, there is a proposal for State Skill Development Mission under the chairmanship of the Chief Minister, along with a steering committee representing the industry
- The nodal department has set a target to train 50000 people by 2022
- The project implementation unit will work with government ITI s as vocational training providers along with private agencies in training for different sectors

**Assam**
- In Assam, Employment Generation Mission (EGM), an autonomous body under the government spearheads the skill development initiatives. Their major objective is to stimulate the economy of Assam through skill development through Project Implementation Agencies (PIAs)
- EGM has registered in its account several success stories enumerating the various workshops and seminars held in training the youth in diverse skill sectors like bell metal unit, printing press, horticulture and many other skills
- The employment generation mission started with 7 lakhs and proliferated from 1 unit to 18 units in just one and a half years. Skill based training is also carried out through Assam State Livelihood Mission and NULM scheme

**Manipur**
- The state of Manipur has created various committees and sectors to create a stimulus in enabling youth undergo skill education and training
- The main agenda of these committees are identified to suggest ways and means of skill up gradation identify why the youth are not very much enthusiastic about enrolling in these programs
- Another important agenda includes reviewing the existing approach, strategies, priorities and ongoing policies and the loopholes in their implementation
- The government of Manipur has also been striving to create an effective linkage between different organizations connected to skill development

**Meghalaya**
- With the constitution of Meghalaya State Skill Development Society, the government has taken skill development in their state to another level by training 7700 youth in the state
- Under the DDU-GKY and state level skill development plans the government aims to train rural youth and provide them with jobs with decent wages
- Their primary agenda is to fill in the gaps in the skill sectors which were once the pride of Meghalaya, and the main source of employment generation in the state
Mizoram

- The process of skill development can be greatly accelerated by training the employees to adequately equip them for enhanced efficiency and responsible behavior
- The endeavor of the Government is to impart need-based training to employees so as to develop the right attitude, necessary skills, duty consciousness, competence and self-motivation to take on the challenges in their work

Nagaland

- The Government of Nagaland has started preparation to put in action the schemes under the NSDC, and realize better ideas about the capabilities and the aspirations of the youth in the state
- Most of the initiatives are also guided by PMKVY to the trainees to get jobs for themselves or be able to set up some enterprises thereby not only employing themselves but also providing others with opportunities to prosper

Sikkim

- Sikkim has inaugurated livelihood schools, which train the youth in various livelihood options and sectors of employment like hospitality and tourism, driver and tour guide, computer software, medical transcription, organic farming, veterinary training, electrical trade, horticulture and teacher training
- So far, Sikkim has been quite successful in initiating and running these livelihood schools. Crafts are essentially an important sector and skill for the people of Sikkim. The major goals and objectives of the Directorate of Handicrafts in Sikkim are to preserve and revive the languishing ethnic cultures of the state

Tripura

- The Tripura government has decided to set up State Skill Development Mission to enable youth to experience employment
- A separate directorate committee is to be formed to run various programs of skill development in various sectors. Under these sectors, the youth of the state of Tripura will be trained based on skill, capabilities, merit and interests. However, the government is keen on enhancing employability and making the youth skill enabled

Nagaland

- The state runs the Suryamitra skill development program to train youth in new and renewable energy with the help of National Institute of Solar Energy, 2E Knowledge Ventures and YouthNet

H. Smart Cities

As the country is experiencing rapid urban expansion, policymakers have narrowed down on the concept of Smart Cities to better manage large populations and while continuing to realize the economic potential. Learning from previous national urbanization initiatives, the Smart Cities Mission promises to simultaneously improve the infrastructure and built environment in India’s expanding cities while offering a new path to urban fiscal health. If successful, Indian cities will position themselves as clean, modern, and competitive places for years to come.23

23 Brookings India
For the North East Region, this presents an exciting opportunity to leapfrog into the next stage of development. They are relatively less burdened with the legacy of old and existing large infrastructure unlike many cities in the rest of the country, and their distinct geographical setting and pristine environment would imply research into and implementation of an innovative approaches. We briefly look at the smart cities planned in NE.

There are a total of 7 cities (Guwahati, Agartala, Imphal, Namchi, Kohima, Pasighat and Aizwal) selected from North East India out 109 cities selected in the Smart City Mission. Out of these 7 cities, 5 (Guwahati, Agartala, Imphal, Namchi, Kohima) have already been shortlisted in Round 1 and 2. Aizwal and Pasighat will be participating in Round-3 of the Mission. The total investment for 5 selected cities is ₹ 8,636.92 crore (Refer Fig 9).24

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24 www.smartcities.gov.in
Guwahati

The gateway to North East, Guwahati is the largest and most established city of the region. The city has witnessed rapid growth during the past few years which has highlighted the infrastructural bottlenecks. Guwahati Smart City Proposal is built on the notion of participatory planning so as to ensure buy-in of the plan from a cross-section of stakeholders. The total project cost under Smart Cities Mission is ₹ 2,296 crore which includes ₹ 1,579 crore under Area Based Development projects and ₹ 622 crore for PAN city projects.

Imphal

The capital city of Manipur, Imphal has the second international airport in the region after Guwahati, and excellent connectivity makes it one of the prime business hubs of the region. Total estimated cost of Smart City projects is ₹ 1,523.86 crore, out of which PAN City has share of ₹ 360.79 crore and Area Based Development cost is ₹ 1,163.07 crore.

Agartala

The state is one of the better developed in the region with a strong rubber industry, and trade relations and connectivity with Bangladesh. With Tripura getting the third International Internet Gateway (IIG) through Bangladesh after Delhi and Chennai, the region is well poised to become the next IT/ ITeS hub. The total estimated cost of Smart City projects is ₹ 2,058.34 crore, which includes ₹ 1,521.63 crore for Area Based Development and ₹ 466.73 crore for Pan City projects.

Namchi

Namchi is a small city with a huge potential for development. Situated 78 kms from state capital Gangtok, Namchi is well connected to other towns in Sikkim and West Bengal. With tourism as an underlying theme, the city will focus on green spaces and eco-friendliness. The total investment in Namchi under Smart Cities Mission will be ₹ 964.56 crore. The Area-Based Development projects cover many diverse use & activity components of the city making it a truly representative area with cost of ₹ 760.56 crore. The proposal is based on the principle of integrating the Natural, Social and Physical context of Namchi to best utilize the immense and diverse potentials offered by the Namchi city. The Pan City project is an integrated ICT based solution for management, monitoring & control and e-governance system for municipal service delivery showcased over the water supply system of the city with the cost of ₹ 161 crore.
Kohima

One of the most tribal part of India, the town’s population is a conglomeration of 16 tribes, and in terms of infrastructure, is a region with high potential for rapid urbanization in the short term. The Area Based Development projects aim to harness this potential through creation of quality physical and social infrastructure to create a high standard of quality of life. The total cost of Smart City projects will be ₹ 1,794.16 crore. Cost of Area Based Development projects is ₹ 1,036.89 Cr and of Pan City projects is ₹624.36 crore.

Pasighat

With agriculture as its prime economic activity, Pasighat’s geographical location, which is suitable for an airport, has been one of the primary reasons for its short listing. Pashighat will participate in Round 3 of the Smart Cities Mission.

Aizawl

The transition from a large village to a Smart City has been a rapid 5-decade progress for the Mizo city. With a high literacy rate, good rail network and sub-tropical climate, the Smart City campaign is expected to create business and enterprise opportunities in the region, whose economy is currently primarily sustained by government services and financial institutions. Aizwal will also participate in Round 3 of the Smart Cities Mission.

Itanagar

Itanagar is the capital of the Indian state of Arunachal Pradesh. Itanagar is situated at the foothills of Himalayas and has immense potential in the textiles sector. Itanagar will also participate in third Round 3 of Smart Cities Mission.
5-point Roadmap Towards Accelerating Growth in North East India
5-point Roadmap Towards Accelerating Growth in North East India

I. 3C approach: Focus on Connectivity, Community and Collaboration

II. Gateway to South East Asia and ASEAN: Develop Trade Corridors, Industrial Parks and integrated infrastructure to leverage connectivity through roads and ports

III. Promote Niche Industries and USPs: Brand ‘Organic’, Tea, Bamboo, Horticulture and Floriculture

IV. Sustainable Smart Cities: 40-year urban development plan for major cities and towns

V. Develop Tourism as a Social & Community Enabler: Prepare roadmap for tourism development with emphasis on community-led tourism models
YES BANK, India’s fifth largest private sector Bank with a pan India presence across all 29 States and 7 Union Territories of India, headquartered in the Lower Parel Innovation District (LPID) of Mumbai. YES BANK has adopted international best practices, the highest standards of service quality and operational excellence, and offers comprehensive banking and financial solutions to all its valued customers. YES BANK has a knowledge driven approach to banking, and offers a superior customer experience for its retail, corporate and emerging corporate banking clients. YES BANK is steadily evolving as the Professionals’ Bank of India with the long term mission of “Building the Finest Bank of the World in India” by 2020.

YES Institute, a new practicing think-tank, has been established as a division of YES BANK, to focus on India’s sustainable and inclusive socio-economic growth and development. The Institute believes that India’s economic growth must adopt a low carbon pathway, leapfrogging to a scenario of unique and resource-efficient high technology manufacturing, sustainable agriculture and services and also that India’s glorious past and rich culture that is anchored in arts, crafts, frugal innovation and diversity must be leveraged to define the country’s growth trajectory along a knowledge driven pathway.