Tourism in North East & Eastern India

Focus East: Tourism Driving the Next Phase of Socio-Economic Growth
**Focus East: Tourism Driving the Next Phase of Socio-Economic Growth**

**December 2014**

**Public and Social Policies Management (PSPM), YES BANK**

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India’s Travel, Tourism and Hospitality industry has the potential to induce sustainable development at the grassroots and aid in economic growth. In 2013, the sector contributed INR 2.178 lakh crore to India’s GDP, added USD 18.13 billion to foreign exchange earnings and generated over 39.3 million jobs. However, despite its huge potential, India’s share of the world’s tourist arrivals is only 0.64%.

In his vision for ‘Brand India’, Prime Minister Narendra Modi has also underlined the importance of Tourism and Tradition as great enablers. The sector is estimated to grow more than four-fold by 2025, thereby creating a cascading multiplier effect of job creation and growth. Independent studies have shown that indirect and induced contribution of the Tourism and Hospitality industry to GDP is three times that of its direct contribution. It also has a multiplier effect on sectors such as agriculture, retail, transportation and financial services.

East and North East India have witnessed an exceptional 27% growth in foreign tourist inflow, following key Government initiatives, diverse product offerings, growing economy, increasing disposable income levels and rising inflow of foreign tourists. However, the immense potential of this resource-rich region remains untapped owing to its challenges of inadequate infrastructure and connectivity, unemployment and low economic development, law and order problems, among others.

Tourism will play a pivotal role in aligning macroeconomic policies with regional development challenges as well as facilitate development of other key sectors with high-growth and employment generation potential such as healthcare, infrastructure, education, among others. Given the rapid evolution of global travel dynamics, key initiatives such as e-Visa, opening of new airports and FDI in rail, infrastructure, insurance and real estate sectors will create viable impetus, vital for continuing critical mass momentum and investment in the under-leveraged inbound segment.

I am pleased to present the YES BANK-ICC Knowledge Report ‘Focus East: Tourism to Drive the Next Phase of Socio-Economic Growth’ which provides a comprehensive policy framework for the development of sustainable tourism in the East and North East for the next 20 years. I am confident that the contents of the knowledge report will facilitate multi-stakeholder deliberations for the growth and development of tourism.

Rana Kapoor
MD & CEO YES BANK
India is probably the only country that offers various categories of tourism. These include mountain tourism, forest tourism, eco-tourism, heritage tourism, adventure tourism, medical tourism (Ayurveda and other forms of Indian medications), spiritual tourism, beach tourism (India has the longest coastline in the East) etc.

As the leading Chamber of Commerce of India, ICC has tried to play an instrumental role in upholding the tourism sector of India. Particularly, we have always tried to highlight the huge potential that East and North East India possess. Looking at from the tourism point of view, North East is truly an unexplored beauty. The waterfalls, the forests, the rhinoceros, the colorful birds, the nature trails, the sun setting over the mountains, the luscious tea gardens, the golf courses fitted with helipads all are very attractive to foreign tourists who are looking for peace and serenity. The added bounty for them will be the aesthetics and colorful festivals that take place around the year. East and North East of India also holds strong connection with the Buddhist tourism since a lot of monasteries and ancient “Stupas” are situated here. Famous monasteries like “Rumtek” in Sikkim attract Buddhist tourists from all across the World. People come from ASEAN countries like Thailand, Myanmar and Cambodia to felicitate various Buddhist rituals. This large number of tourist inflow does not only have spiritual bearing but also have strong business implications.

India and India's North East has to capitalise on the huge inflow of tourists that come in to the country every year. ICC with its knowledge expertise can actually conceptualise, formulate and offer its services to make East and North East an exclusive destination for tourism. ICC can also actively partner the Government in garnering private sector support for achieving an overall socio-economic development in the region.

This report is a joint study of ICC and Yes Bank which looked into in detail about the tourism potentials of East and North East India. The report has also tried to figure out ways to harness tourism potentials of East and North East. I hope this work would be of great help to industrialists, investors, government departments and academicians.

Shiv Siddhant Kaul
Sr. Vice President
Indian Chamber of Commerce
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The Indian Tourism Story
1. The Indian Tourism Story

1.1 Introduction

Global Scenario

The travel and tourism sector is one of the fastest growing segments of the world economy. In 2013, Travel & Tourism’s total contribution to the global economy rose to 9.5%\(^2\) of global GDP (US $7 trillion), not only outpacing the wider economy, but also growing faster than other significant sectors such as financial and business services, transport and manufacturing. In total, nearly 266 million jobs were supported by Travel & Tourism in 2013 i.e., 1 in 11 of all jobs in the world. This makes it one of the most significant components of the global economy.

The India Story:

Travel and tourism has strategic importance in the Indian economy due to the various socio economic benefits attached to it. Tourism is critical for provision of employment, income and foreign exchange in the country, and has a direct bearing on the agriculture, construction and handicrafts industry of the country.

Global Standing: According to United Nations Tourism Organization (UNWTO), India ranked 41st in the international tourist arrivals, 16th in the World Tourism Receipts and 7th in Asia Pacific Region for Tourism Receipts during 2012. India is ranked 65th out of 144 countries in the World Economic Forum Travel & Tourism Competitiveness Report 2013.

Indian Tourism Industry Highlights

- Economic impact of INR 6,631.6bn in 2013
- Supports 35,438,500 jobs
- Visitor exports generated INR1,110.9bn (4.1% of total exports) in 2013
- Investment of INR1,938.7bn (6.2% of total investment) in 2013

Source: WTTC

\(^2\) Source: WTTC (World Travel & Tourism Council)
1.2 Analysis of Recent Trends

According to the World Economic Forum’s Travel and Tourism Competitiveness Report 2013, India ranks 11th in the Asia Pacific region and 65th globally out of 140 economies ranked on Travel and Tourism Competitiveness Index. This has improved three places from 2011 i.e., from 68th to 65th rank. India has been witnessing steady growth in its travel and tourism sector over the past few years. Total tourist visits have increased at a rate of 16.3% per annum from 577 million tourists in 2008 to 1057 million tourists in 2012\(^2\).

India’s travel and tourism industry is set to grow by about 7.3% in 2014 as per the estimates of the World Travel and Tourism Council. Revenue from domestic tourism is expected to grow 8.2% compared with 5.1% a year ago driven by increasing domestic travel, growth of low-cost airlines and upgrading of airport infrastructure. On the other hand, growth in the amount of international visitors spending in the country could slow to 2.9% to touch 7.36 million from 6.2% in 2013.

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\(^2\) Ministry of Tourism, Government of India
**Contribution to GDP:** In 2013, the travel and tourism industry contributed INR 2.17 lakh crore or 2% to the country’s GDP. This is expected to rise to INR 4.35 lakh crore by 2024\(^1\). The direct and indirect contribution of tourism to GDP during 2011-12 as per the Tourism Satellite Account of India is 6.76%.

**Figure 3: Direct contribution of Travel & Tourism to GDP**

![Graph showing the direct contribution of travel and tourism to GDP from 2004 to 2014.](image)

**Table 1: Inbound Tourism**

<table>
<thead>
<tr>
<th>Inbound Tourism Receipts (in million US$)</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>57,725</td>
</tr>
<tr>
<td>Malaysia</td>
<td>25,033</td>
</tr>
<tr>
<td>Turkey</td>
<td>23,345</td>
</tr>
<tr>
<td>Thailand</td>
<td>22,354</td>
</tr>
<tr>
<td>Singapore</td>
<td>11,098</td>
</tr>
<tr>
<td>India</td>
<td>6,578</td>
</tr>
<tr>
<td>Australia</td>
<td>6,146</td>
</tr>
</tbody>
</table>

*Source: WTTC, Travel and Tourism Economic Impact- India, 2014*

**Employment Potential\(^4\):** The travel and tourism sector supported 25 million jobs in 2012 directly related to the tourism sector. Constituting 4.9% of the total employment in the country in 2012, this is expected to amount to 31 million jobs by 2023. Total contribution of tourism to employment including indirect job creation is to the tune of 11.5%. This makes travel and tourism one of the largest employers in the economy.

\(^1\) World Travel & Tourism Council (WTTC)
\(^4\) WTTC
Forex Receipts: Tourism contributes substantially in the country’s Foreign Exchange Earnings (FEE). The FEE from tourism during 2013 was INR 1,07,671\(^5\) crore (Provisional) with a growth of 14\% compared to 2012.

Capital Investment: Travel & Tourism is expected to have attracted capital investment of INR1,938.7 bn in 2013. This is expected to rise by 9.8\% in 2014 which would be 6.6\% of the total capital investment in the economy, and rise by 6.5\% p.a. over the next ten years to INR3981.3 bn in 2024.

As India continues to focus on sustainable economic growth based on employment generation, the opportunities offered by the Tourism sector are immense. The sector is well positioned for accelerated growth in the future.

\(^5\) Annual Report 2013, Ministry of Tourism, GoI
Tourism in North East & Eastern India
Tourism as a Growth Engine: The Socio-economic Perspective
2. Tourism as a Growth Engine: 
The Socio-economic Perspective

2.1 Sustainable Approach to Livelihoods

A livelihood is the means by which a person or household makes a living over time. Livelihood security implies dignity in a secure and just society and being able to withstand stresses of death, disease, natural disasters or economic slumps.

India is one of the fastest growing economies in the world. During the period from 1995-96 to 2007-08, the gross domestic product (GDP) averaged 7.6%. Thereafter, though growth has slowed as a result of the global economic crisis, the country has escaped severe slowdown. However, the benefits of growth have not been distributed equally, and high rates of poverty persist, heavily concentrated in rural areas. The worrying trend is the fact that the rapid growth of the last two decades has not translated into commensurate improvement in the living conditions of the people.

This is especially true of the North East region; the rapid growth seen in the country has largely bypassed the region. This has been due to the unfriendly terrain and legacy issues of the region. In the absence of meaningful development reaching the grassroots level, the region also faces further socio-economic turmoil and unrest.

The issue of sustainable livelihoods is complex in India with 60 per cent of its population employed in the agriculture sector, which contributes only ~15 per cent of the GDP. Farm based jobs have remained stagnated due to structural changes in the Indian economy. The share of primary sector in GDP has progressively declined from 26% to 15% between 1998 and 2013, even as the share of rural population, which was dependent on this sector, has reduced only marginally. This means that India’s development models have to be robust enough to deliver dignity of life and sustainability of livelihoods at a scale and in a pluralistic context that cannot be compared to any other country in the world. This is further accentuated by the challenges of fragmented land holdings, low levels of formal education and insufficient capacity building of beneficiaries.
The Indian government has realized the importance of providing sustainable livelihoods especially to the poor and weaker sections of the society. The country has a long history of Government led social safety net interventions, dating back to before independence in 1947. There have been numerous models with varied degrees of success being implemented in the six decades post independence. The latest of this series is the National Rural Livelihoods Mission which is demand driven and relies on participative identification of the poor.

The Sustainable Livelihood framework places people, particularly rural poor people, at the centre of a web of inter-related influences that affect how these people create a livelihood for themselves and their households. The livelihood assets here could be the natural resources, skills and access to credit, health and other amenities. While improvement to Agriculture and other primary sector activities remain key to poverty alleviation initiatives, holistic thinking about rural development and poverty reduction is essential for sustainability. Tourism has emerged as a key enabler in this context. Sustainable tourism livelihood is one that is embedded in a context in which tourism can address these vulnerabilities, and achieve livelihood outcomes that are economic, social, environmental and institutionally sustainable without damaging the others. This approach for tourism aims to incorporate two principles - the key principle of sustainability of livelihood and tourism. The core tourism livelihood assets here are: a) Natural capital; b) Economic capital; c) Social linkages and d) Institutional capacity.

**Figure 4: Sustainable Eco-Tourism Approach and Livelihood Assets**

Source: YES BANK Analysis
Key success factors for Sustainable Livelihood Approach to Tourism

✓ **Community Participation** needs to be built in within the sustainable livelihood framework and is essential for any sustainability model to succeed. This has to be both at the level of decision making as well as benefit sharing.

✓ **Institutional Framework:** for tourism to address the social, economic and environmental sustainability aspects, a robust institutional framework is essential which can not only facilitate gains to the community but also do it in a relatively equitable manner.

**Figure 5: Sustainable Rural Livelihoods by Tourism**

2.2 Policy Landscape and Institutional Frameworks

**Eastern India**

**a. West Bengal:**

**West Bengal Tourism Policy, 2008:** The objective of the West Bengal Tourism Policy is to develop Tourism as a key industry to make it an important contributor to the state’s economy by promoting responsible and sustainable tourism through integrated development of tourism infrastructure in partnership with private, national and international corporate bodies. Key Strategies:

✓ Tourism has been accorded ‘Industry’ status. A special scheme— The West Bengal Incentive Scheme 2008 was launched with the following key features:

• **State Capital Investment subsidy** for project located in Group A area will be entitled to a State Capital Investment Subsidy @ 7.5% of the fixed capital investment subject to a limit of Rs.100 lakh. The same subsidy for Group B area would be 10% subject to a limit of Rs.100 lakh. For Group C area, the subsidy would be 15% subject to a limit of Rs.120 lakh, and in Group D area, it would be 20%
subject to a limit of Rs.150 lakh. However, in no case will the amount of this subsidy to an eligible unit in respect of the building component exceed 50% of the total State Capital Investment Subsidy given to the unit.

- **Interest subsidy** to the extent of 50% of the annual interest liability on the term loan borrowed from a commercial bank/financial institution for implementation of the project, subject to a limit of Rs.25 lakh per year, for 5 years for units located in Groups A and B areas, and for 7 years for units located in Groups C and D areas.

- **Electricity**: waiver of electricity duty on the electricity consumed in its approved project for a period of 5 years from the date of commercial operation.

- Additional incentive for employment generation to the extent of 60% of the expenditure incurred by it for paying its contribution towards Employees State Insurance (ESI) and Employees Provident Fund (EPF) Scheme for a period of 5 years if the unit is located in a Group A or B area, and for a period of 7 years if it is located in a Group C or D area.

- **Stamp Duty**: a refund of 50% of stamp duty and registration fee paid by it for the purpose of registration of documents within the State relating to purchase/acquisition of land and buildings for setting up the approved project.

- **Quality up-gradation**: reimbursed 50% of the fixed capital investment expenditure incurred for quality improvement, modernization and installation of pollution control devices and for obtaining ISI/BIS/ISO certification, subject to a maximum of Rs.7.5 lakh.

- **Land Bank**: identify and earmark lands which can be made available for tourism-related projects. Land at the disposal of the Government will be provided for tourism projects on long-term lease basis instead of auctions.

**b. Bihar:**

Bihar Government had unveiled its last tourism policy in 2009 with a focus on accelerating tourism growth in the state. The policy envisages to position tourism as a state priority, in particular promoting cultural, religious and wellness tourism, improving connectivity, creating world-class infrastructure and realizing the full potential of economic and social benefits of tourism industry.

- **Land Bank developed for** offering the land identified for construction of star hotels to private sector at market price within the identified circuits. Such land will be offered upon approval of State Investment Promotion Bureau (SIPB) as equity participation on behalf of government at market rates for setting up joint ventures.

- **Taxation Incentives**: 100% exemption in Stamp Duty and Registration fees on land, 100% exemption from Luxury Tax, Electricity Duty, Conversion Charge for setting up new tourism projects. In addition, new projects will be eligible for 80% reimbursement of VAT for 10 years at a maximum of 300% of capital invested. For SC/ST/Women/Handicapped entrepreneurs, an extra 5% exemption if offered under the policy. Entertainment tax is also exempted for seven years from the commencement of operations.
iii. **Project Incentives:** 30% of costs incurred in obtaining technical know-how subject to a maximum of 15 lakh and 50% for project report preparation subject to a maximum of Rs. 75,000 are reimbursed after the commencement of operation. In addition 50% of costs incurred on plant & machinery for captive power generation will also be reimbursed.

iv. **Special Zones:** Tourism units located in Bihar Industrial Area Development Authority / Export Promotion Industrial Park / Food Park / Agri Export Zones are eligible for incentives and subsidies.

<table>
<thead>
<tr>
<th>S. No.</th>
<th>Tourism Unit</th>
<th>Grant</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Small / Tiny units Financial Limit.</td>
<td>50% of 7.50 lakh (maximum)</td>
</tr>
<tr>
<td>2</td>
<td>All large / medium / mega units Financial Unit</td>
<td>25% of 15.00 lakh (maximum)</td>
</tr>
</tbody>
</table>

v. **Administrative Measures:** In order to streamline the approval process and allow speedy clearances for new tourism infrastructure and projects, a Single Window Clearance System has been established.

vi. **Tourism Promotion:** Bihar State Tourism Development Corporation will be responsible for marketing and promoting the tourist destinations and products. Tourism Information Centers across the state to be strengthened using ICT-based technologies for providing hotel booking and transport facilities.

vii. **Tourism Human Resource Development:** The policy envisages setting up Hotel Management Institutes, Food Craft Institutes and Travel and Trade Institutes for creating the necessary pool of manpower for the hospitality and tourism industry. In addition the tourism department will also be training guides on foreign languages to support overseas tourists.

**C. Odisha:**

Odisha Government has unveiled its latest tourism policy in the year 2013 focusing on the development of tourism infrastructure in the state. The policy encourages greater private sector investment in creating new infrastructure through targeted incentives, concessions etc.

**Policy Initiatives for Encouraging Investment in Tourism Projects**

i. **Allotment of Land:** The state government is in the process of creating a land and property bank at key tourist locations throughout the state for the development of tourism projects. The land will be allotted at concession rates or by auction to private developers as per the notifications of the tourism department.

ii. **Capital & Interest Subsidy:** The state government will be providing subsidies to encourage investment in tourism infrastructure and tourism projects.
Table 2: Odisha – Capital & Interest Subsidy for Investment in Eligible

<table>
<thead>
<tr>
<th></th>
<th>Zone A</th>
<th>Zone B</th>
<th>Zone C</th>
</tr>
</thead>
<tbody>
<tr>
<td>Investment Range</td>
<td>Municipal Corporation area of Bhubaneswar</td>
<td>Rest of the state except KBK, Kandhmal, Gajapati District and zone A</td>
<td>KBK, Kandhmal, Gajapati District</td>
</tr>
<tr>
<td>Capital Subsidy</td>
<td>Rs.10 lakh – 20 Cr.</td>
<td>20% of the capital investment subject to maximum of Rs.20 lakh</td>
<td>25% of the capital investment subject to maximum of Rs.25 lakh</td>
</tr>
<tr>
<td></td>
<td>Rs.20 Cr. &amp; above</td>
<td>25% of the capital investment subject to maximum of Rs.30 lakh</td>
<td>30% of the capital investment subject to maximum of Rs.35 lakh</td>
</tr>
<tr>
<td>Interest Subsidy</td>
<td>Rs. 10 lakh and above</td>
<td>3% interest subsidy subject to maximum of Rs.1.00 Cr. for the entire 5 years</td>
<td>5% interest subsidy subject to maximum of Rs.1.00 Cr. for the entire 5 years</td>
</tr>
</tbody>
</table>

Source: Odisha Tourism Policy 2013

iii. **Tax Incentives:** In addition to subsidies, the state government is also providing 50% exemption in Stamp Duty on purchase of land for all tourism projects, 30% reimbursement of VAT paid for new projects subject to a maximum of Rs 10 lakh per annum for 5 years, and 100% entertainment tax exemption to multiplex cinemas (minimum investment of Rs. 3 crore), Public Aquarium, Aqua Parks and Amusement Parks.

iv. **Transport Connectivity:** In order to increase connectivity to tourist locations, 75% exemption on registration charges and 50% concession on permit charges are being provided for new air-conditioned coaches with a minimum capacity of 25 seats.

v. **Tourism Promotion:** The tourism department will also be incentivizing for participation in overseas tourism events up to a maximum of Rs. 75,000 for each event. In addition incentive of 20% on actual cost of production on tourism literature/videos subject to a maximum of Rs. 50,000 per annum will be provided for promoting tourist products of the state.

vi. **Tourism Human Resource Development:** Private sector participation will be encouraged in establishing new Hotel & Tourism Management institutes by allotting land in zone B & C as per the tourism policy. Other institutions such as ITIs, management colleges will also be encouraged to offer tourism specific courses.

vii. **Administrative Measures:** Tourism department will also make use of the provisions of Single Window, Escort Officer, etc. to fast-track the clearance of tourism projects by facilitating in obtaining various permission and clearances, in addition to promoting private projects at national and international forums.
North Eastern India Policy Analysis

Arunachal Pradesh

The state of Arunachal Pradesh has come up with the 20 year perspective plan on tourism, but never went ahead to initiate and implement it at state level. The border state, while very rich in heritage, has the security and safety aspects to look at. The suggested policy document takes into consideration 7S: seven key areas that will provide the thrust to tourism development and make it one of the development areas: Swagat (Welcome), Soochana (Information), Suvidha (Facilitation), Suraksha (Safety), Sahyog (Cooperation), Samrachana (Infrastructure Development), and Safai (Cleanliness).

The perspective plans includes carrying capacity studies., instruments of spatial and land use planning, instruments of architectural controls for restoration of old properties and construction of new ones in old towns and cities, strategy for local community participation and protection of cultural identity, awareness programmes for local commitment to the project.

The tourism plan has already placed objectives as:

☑ To trigger higher growth of economy, also balancing for sustained socio-cultural and physical environment
☑ To introduce new tourism products i.e. Adventure tourism, heritage tourism, sports tourism, education tourism
☑ To Identify infrastructure and other developmental needs for tourism i.e. identification of projects, their financing & management strategies
☑ To formulate integration of various departments to promote tourism

Arunachal Pradesh has all the attributes to become a successful and sought after tourist destination if the state implements the policy already charted out with help of Ministry of Tourism and private sector. Special emphasis needs to be laid on developing connectivity infrastructure if the state proposes to bring out tourism products.

Assam

Tourism policy for Assam was unveiled in 2008 with broad objectives of making the sector a high priority for overall socio-economic development of the state. The broad objective of the policy in addition to improving the tourism infrastructure in state, is to position the state along with other North-Eastern states as a whole to link to the South Asian and South East Asian markets and take full advantage of the ‘Look East’ policy initiatives of Government of India.

Policy Initiatives for Encouraging Investment in Tourism Projects

1. **Land Bank:** Since availability of land in the state is often a constraint for the development of tourism infrastructure, the state government has identified suitable land in the Tourism Zones and created a Land Bank. Such land parcels will be allotment to the private sector on lease, outright sale or rent on a case-to-case basis.

2. **Capital Subsidy:** 10% of the capital cost of the project subject to a maximum of Rs. 10 lakhs will be subsidized for approved tourism projects. Special incentive packages for FDI and encouraging PPP in quality tourism and infrastructure projects.
3. **Taxation Incentives:** Up to 25% of VAT (minimum investment of Rs. 1 crore) and 25% on Luxury Tax will be reimbursed for a period of five years from 2008-09.

4. **Safety & Security:** The State Government has put in place appropriate mechanism and given high priority for the safety and security of the tourists visiting the state.

5. **Tourism Human Resource Development:** Due to the short supply of trained manpower in the state, the tourism policy envisages to set up new Food Craft Institutes and upgrade the existing Hotel Management Institute at Guwahati. In addition private sector assistance will be taken to conduct training of trainers for specialized tourist activities such as Adventure Tourism and water sports.

6. **Tourism Promotion:** The tourism department has prepared a comprehensive marketing strategy for building “Brand Assam” in lines with “Incredible India”, to portray the state’s unique culture and tourist destinations. “Festival of Assam” will be organized in major markets once in three years. In addition the tourism department will be participating in major national and international tourism fairs jointly with private tourist establishments. Incentives to be provided for national and international film shootings.

Sustainability will be the key focus of the tourism policy and a comprehensive Sustainable Tourism Guidelines to be formulated in achieving the long-term tourism vision.

**Institutional Framework for Enabling Growth in Tourism**

The state government has formed an Assam Tourism Council with members drawn from the concerned tourism related departments of the State Government, Government of India and the private stake holders to act as an advisory body. In addition Tourism Advisory Committee has been setup in each tourism zone. A Cabinet Committee under the Chief Minister will be overseeing the effective implementation of the tourism policy.

**Manipur**

Manipur is an important cog to develop India’s plans on Look East Policy, the Trans-Asian Highways and expansion of railways in North East region. The state government has planned to take advantage of these developments and therefore, seeks to create a unique brand to market Manipur Tourism as the ‘Gateway to South-East Asia’ in conformity with its modern outlook, relevance, competitiveness, strategic location and commercial aspects.

**Policy Initiatives for Encouraging Investment in Tourism Projects**

1. **Relaxation and exclusion of Manipur from the Protected Area Regime** since January, 2011 has started attracting foreign tourists to the State. Ministry of Home Affairs has in principle approved establishment of VISA on Arrival (VoA) facility at Moreh and at Imphal International Airport. It is expected to facilitate medical tourism in the state.

2. The state policy proposes to **facilitate incentives/subsidy** for development and promotion of tourism industry in the State.

3. The immediate priority has been laid on creating world class accommodation& infrastructure, identification, improvement and up-gradation of destinations and other tourism assets and making these operational under Public-Private Partnership.
4. **Comprehensive programme for capacity development** and hospitality promotion shall be organized from time to time in consultation with all stakeholders.

5. Government plans to facilitate larger flow of funds to tourism infrastructure and to create **Tourism Development Fund** to bridge critical infrastructural gaps.

6. Government also plans to rationalize taxes, to put a cap of 20% on all taxes taken together on the accommodation and hospitality units, to allocate suitable land for tourism purposes at reasonable prices.

Even though the state is focusing on developing its own policy focus, it is important that the North Eastern Region has a comprehensive policy focus and for developing connectivity and circuits.

**Meghalaya**

Meghalaya the “Abode of the Clouds”, fully understands the potential of a booming tourism sector and has just recently updated its 2001 tourism policy in 2011 for developing unique brand for the state and sustainability. The new policy is also in the process of preparing a master plan for integrated tourism development. The focus will be on development of destinations and circuit development not only within the state but with major circuits of the neighboring states particularly Assam.

**Policy Initiatives for Encouraging Investment in Tourism Projects**

1. The government is interested in promoting **Community based tourism** as the land tenure system prevalent in the State is tilted towards the community with the Government having very little or no land at all.

2. **Meghalaya Tourism Development Corporation** has been set up for promotion so as to increase its revenue. Technology based reservations and tourist tracking will be focus of the corporation.

3. Government of Meghalaya has initiated development of tourism projects in the **Public Private Partnership (PPP)** mode.

4. The Department of Tourism is also in the process of submitting proposals to Government of India for the development of heliports.

5. Under the **North East Industrial and Investment Promotion Policy 2007**, the state government is offering 100% income tax exemption, capital investment subsidy, interest subsidy and comprehensive insurance. The Department of Tourism will provide incentives to entrepreneurs for new projects in the Tourism sector for infrastructure development. The incentives will be subsidy limiting the amount to 30% of the project cost for approved projects within the amount of Rs 1.00 Crores to 1.50 Crores.

6. Tourism Department will provide assistance for **purchase of multi-utility vehicles** to approved resort owners/hotel owners/tour operators limiting the amount to 25% which will be the deposit amount to financial institutions providing loans for purchase of vehicles for tourism purposes.
Mizoram

Mizoram along with financial and technical support of Department of Tourism, Govt. of India, has been working on strengthening its tourism assets, which are ecologically sensitive and also has safety issues. The entry permit formality for both domestic and international tourists is a serious hurdle for tourists who would like to visit the state.

Policy Initiatives for Encouraging Investment in Tourism Projects

1. The state government declared its Industrial Policy in March 1993, wherein tourism has been declared as an industry.

2. Funding agencies, like Asian Development Bank (ADB), Overseas Economic Corporate Fund (OECF), now JBIC, International Monetary fund (IMF) are already operating in the region to provide soft loans for development projects.

3. The overall costing of the Tourism Development in Mizoram under the new 20-year perspective plan has been worked out as a Block Estimate. The total outlay of the Perspective Plan over the next 20 years (2002 – 2021), amounts to Rs. 270 Crores, i.e. approximately Rs. 13.5 Crores per year. The Perspective Plan proposal envisages about 30 % investment from the Government (Central and State) Sector and 70 % investment from the private sector. The Projects will be self-supporting, thus taking care of the recurring costs and future maintenance and up-gradation costs. The growth rate will be low in the preliminary years (up to 5 years), however depending on the initiative and other socio-economic conditions in the Northeast region, the growth rate could increase substantially and the state will accrue all the benefits.

4. The government plans formation of advisory, controlling, supervising, co-coordinating and implementing committees whose action needs to be time bound within 3 months of the approval. The committees are expected to finalize the prioritization of the projects for the first five years and initiate further action for the implementation of those projects. Such decisions have time limits of six months from the time of approval.

Nagaland

The tourism department of Nagaland was only curved out in 1981, when it was bifurcated from the Department of Information and Public Relation. While the challenges of security and infrastructure are there with the state, the tourism policy has tried to erase the difficulties and achieve better footfalls of tourists.

Policy Initiatives for Encouraging Investment in Tourism Projects

1. The State has formed focused tourism bodies for different work. Nagaland Tourism Council headed by the Chief Minister is entitled to take policy decision to boost the tourism sector and give their recommendation on tourism related problems, activities and development programs. The State Tourism Coordination Committee, under the chairmanship of Chief Secretary is supposed to take care of inter-departmental coordination.

2. The state has developed strategic policy to provide transport services, information counters, telephone facilities etc. which will contribute in generating a tourist friendly atmosphere. Inter-state tourism circuits will be developed by linking the important places of other states across the borders of Nagaland with other circuits.
3. Under the **State Industrial Policy of Nagaland 2000**, Tourism has been accorded the status of “Priority Sector”. Accordingly, Government orders will be issued making tourism activities eligible for all benefits to the industry.

4. **Financial corporations** like NMFC/NSFC/NEDFI/TECI etc., will be associated to finance profitable projects like hotels, restaurants, transport services, travel agents and other related activities.

**Sikkim**

Tourism is a major engine of economic growth, employment and poverty alleviator in the state. The state government has declared the year 2010 as ‘Year of Tourism’ and also unveiled a new tourism policy to capitalize on the growing interest among domestic and international tourists.

**Policy Initiatives for Encouraging Investment in Tourism Projects**

1. The state has laid down the tourism policy focusing on sustainability and responsible tourism focusing on minimising the ecological footprints and strict rules for private operations, over exploitation of natural resources and preservation of cultural heritage. A voluntary code of ethics has to be accepted by every investor in the state.

2. **Land Bank:** Government is in process of building up a land bank for tourism development by acquiring land at various places.

3. **Skill Development:** Institute of Hotel Management (IHM) by Ministry of Tourism, and State Government has the capacity of training about 560 youths. A new Food Craft Institute (FCI) has also been sanctioned by MoT. Indian Himalayan Centre for Adventure & Eco-Tourism (IHCAE) at Chemchey has been established and to promote adventure tourism. For strengthening of service sector, manpower and other interlinked services, better capacity building programme/ Livelihood Schools have been started along with the training at National and International level institutions.

4. **Single Window Permits:** Single Window permit for Nathual, Tsomgo have been initiated. Inner Line Permit (ILP) have been made more easy, stay period has been extended for a total period of 60 days with an extension of 30 days each. Newer areas have been opened for ILP. The procedure is expected to simplify the process to open up more destinations for international tourists.

5. **Exploring New Areas:** More areas have been opened for Eco tourism & Wildlife; Village Tourism; Adventure Tourism; Wellness, Health, Yoga, Herbal and medical tourism; Religious, culture, Heritage and pilgrimage Tourism, Tea Tourism and Hydro Tourism and others.

However, it has to be acknowledged that the state and the region as a whole has a poor connectivity due to non-existence of Air links, rail link and only one badly maintained entry road. The infrastructure bottleneck needs to be addressed at foremost to enable tourist flow. Sikkim is expected to have an Aerodrome near Gangtok by 2011, rail link by 2015 and good National High way & alternate road at the earliest.
2.3 Issues and Challenges

The travel and tourism sector is growing at a healthy rate in recent years in India due to the key drivers of increasing disposable incomes, changing lifestyles and enhanced focus by the Government. However, the true potential is still to be realized due to varied challenges related to infrastructure and Government regulations. The issues of adequate world class infrastructure in terms of roads, airports and civil amenities like availability of electricity, water supply and sewage systems are generic in nature and plague the entire economic development of the country including the travel and tourism sector. Other key challenges specific to the sector include-

**Human Resources:** Availability of skilled manpower is a major challenge faced by the travel and tourism industry, one of the largest employment generators in the country. To sustain growth in the travel and tourism industry, trained manpower is required at every level — managerial, supervisory, skilled or semi-skilled. A study conducted by Ministry of Tourism suggests that existing supply of human resources do not cater to even 40% of the demand. Thus, the industry has no alternative but to fill the void with untrained resources. Such a high proportion of untrained manpower adversely affects quality of services offered to the tourists.

**Taxation:** Travel and tourism in India is a high-taxed industry, which makes India expensive as a tourist destination. This is affecting the growth of the industry in India and it is losing out to other low-cost destinations. Various taxes are levied across the entire industry right from tour operators, transporters, airline industry to hotels and these include service tax, luxury tax, tax on transportation, tax on aviation turbine fuel (airline industry), and various taxes on transportation. In addition, these tax rates tend to vary across different states in the country.

**Security Concerns:** Security has been a major problem for growth of tourism for a number of years due to terror threats and other internal disturbances. Some episodes of assaults on female tourists in recent years have further dented the image of the country as a safe tourist destination.

Other than the above, there are challenges specific to tourism growth in North Eastern India which has been enumerated below:

**Low Connectivity:** Low connectivity with the rest of India is perhaps the greatest economic impediment in the region. This is primarily due to the difficult mountainous terrain and dense forests.

**Socio-Political Unrest:** Most of the states have various levels of conflict within and with the Government based on aspirations of various ethnic groups and tribes. Nagaland, Manipur, Assam, and Tripura have been suffering from ethnic violence for decades. The friction is liable for further escalation if adequate development initiatives do not reach the grassroots level.

**International Borders:** Most of the region shares its border with foreign countries including China, Bangladesh, Bhutan, Nepal and Myanmar. In fact, 98% of NE borders are international ones and bears the brunt of illegal cross-border activities and high militarization.

As such, the region has lacked sustained business and enterprise and has depended heavily on the central and state governments’ initiatives for sustainable progress.
3. Focus East

3.1 East and NE India: The Next Tourism Hotspot

North East Profile

North East India comprises of the eight States of Arunachal Pradesh, Assam, Manipur, Meghalaya, Mizoram, Nagaland, Tripura and Sikkim is geographically situated in the North East corner of India, at Latitude 21.57°N - 29.30°N and Longitude 88°E - 97.30°E with an area of 25.5 million Sq. Km. It comprises 7.8% of the land area of the country. The largest state in terms of the area is Arunachal Pradesh which occupies an area of 83743 sq. km followed by Assam which occupies an area of 22327 sq.km. The smallest of all the 8 states is Sikkim which has an area of 7096 sq. km.

The region shares the international boundaries of India with China to the North, Bangladesh to the South West, Bhutan and Nepal to the North West and Myanmar to the East. This region is connected with the rest of India only through a narrow corridor in North Bengal, known as ‘Chicken Neck’, having an approximate width of 33 km on the eastern side and 21 km on the western side.

Flora and Fauna: NE is regarded as one of the 7 most bio-diverse regions of the world. The area is made up of mountains above the snow line and plains just a little higher than sea level. Cherrapunjee and Mawsynram which have the highest rainfall in the world are located in the NE. The region has at least 7500 flowering plants, 58 bamboos, 64 citrus, 28 conifers, 500 mosses, 700 ferns and 728 lichen species.

Many endangered species of fauna like the one-horned-Asiatic rhino, white winged- wood duck, and Golden Langur can be spotted in the reserved forests and National Parks of NE. The region possesses more than 550 varieties of orchids, which is said to be almost 70% of the total orchid species identified so far. The region is equally rich in faunal diversity. An estimated 3624 species of insects, 50 molluscs, 236 fishes, 64 amphibians, 137 reptiles, 541 birds and 160 mammalian species have been identified so far. A wide variety of man-modified ecosystems such as ‘jhum’ (one way of shifting Cultivation) agro-ecosystem, wet rice agro-ecosystem and alder based agro-ecosystem contribute towards the rich ecosystem diversity.
This region is a melting pot of variegated cultural mosaic of people and races, an ethnic tapestry of many hues and shades. The folk culture is still vital in this region. The primitive culture of at least the Neolithic age now co-exists with the modern and post-modern lifestyle. Handlooms are a rich village industry in most of the states in the region. Some of the handloom products, which are known for their excellent craftsmanship are - carpets of Arunachal Pradesh, Muga silk products of Assam, Lashingphee of Manipur, Shawls of Nagaland and Mizoram. Other common handloom products such as bed Sheets, Scurf, Jackets are produced in almost all the States of the region.

Tourism Trends:

Tourist inflow into the NE states has grown consistently over the previous decade. It has grown from 3.13 mn in 2003 to 6.68 mn in 2013 displaying a CAGR of 8% during the period. Within the overall growth, foreign tourist arrivals have shown a higher growth i.e., a CAGR of 11.1% versus the 8% growth seen in domestic tourist visits albeit on a small base.

Figure 6: Tourist Inflows in NE States over the previous decade (mn)

There is a wide variation in the total number of tourists’ inflow among the states. Data reveals that the total number of inflows of tourists in Assam state is much higher as compared to the other states of North-east region. The state of Assam has emerged as the central hub for almost all kind of transaction, business, facilities and so on in North-eastern region of India, excluding Sikkim. This is evident by the fact that 69.5 % of the total tourist inflow into the NE is accounted by the state of Assam. Nagaland has been found as the least visited states with lowest tourists’ inflows.
**Figure 7: Tourist Flows into individual NE States in 2013 (mn)**

**SWOT Analysis:**

**Opportunities**
- Unexplored Tourist Attractions
- Community Based Tourism
- Co-ordinated NE Tourism Circuit
- Regional Positioning - SE Asia Focus

**Strengths**
- Natural Resources
- Cultural Heritage
- Variety of Tourism Attractions
- Adventure Tourism
- Look East Policy & Government Focus

**Weaknesses**
- Accessibility
- Limited Connectivity
- Image Deficit due to Social Unrest
- Poor Brand Recall

**Threats**
- Socio-political Instability
- Over-exploitation of Fragile Eco-system
The natural beauty of the NE region is the most varied and mostly unexplored. It is extremely rich in natural heritage- rich biodiversity, huge forest wealth, fruits and vegetables, flowers, herbs and aromatic plants, rare and rich flora and fauna, India's largest perennial water system, the River Brahmaputra and its tributaries, horticultural products/plantation crops/vegetables/spices and rare forest products. North Eastern Region is ideal for both passive and adventure forms of Eco-Tourism with wildlife sanctuary/parks, good scenic beauty, waterfalls, forests etc.

With more than 220 ethnic groups with equal number of dialects makes it hugely diverse region. Folk culture is still vital to the region. The primitive culture of at least the Neolithic age now co-exists with the modern and post-modern lifestyle. Well integrated with life and nature, the folk artworks have a common element of tune and tone. The rich tribal heritage and culture is what differentiates North East with the rest of India.

Another major differentiator is the rich and varying Arts and Crafts here across the 8 North Eastern States. Here unlike most places, handicrafts are part of everyday life. Handlooms are a rich cottage industry in most of the states in the region. This in most of the cases is a hereditary occupation. Some of the handloom products, which are known for their excellent craftsmanship are - carpets of Arunachal Pradesh, Muga silk products of Assam, Lashingphee of Manipur, Shawls of Nagaland and Mizoram. Other common handloom products such as bed sheets, Scurf, Jackets are produced in almost all the States of the region.

In addition to eco-tourism and culture tourism opportunities, the region has much to offer for the active adventure segment including river rafting among others, trekking of various grades and levels, rock climbing, hang gliding etc.

Harnessing these opportunities in a coordinated manner with a strong institutional mechanism in place coupled with the positive externalities arising from the Government’s Look East Policy has the potential to transform the region into a major international tourist hub.

**State Tourism Profiles**

**Arunachal Pradesh:**

Arunachal Pradesh is one of Asia’s most biologically diverse and intact forest eco-system. It has been recognized as one of the 18 biodiversity hotspots of the world. With nearly 94% of its area covered under forests, the Forest eco-system of Arunachal Pradesh is linked to the forests of neighbouring countries like Bhutan, Tibet and Myanmar. Ten of the sixteen districts of the State of Arunachal Pradesh have altitudinal variation forming Bio-diversity zone of Tropical, Sub-tropical, Temperate, Sub-alpine and Dry-alpine.
### Key Tourist Attractions

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<thead>
<tr>
<th>Destination</th>
<th>Type</th>
<th>Key Highlights</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tawang</td>
<td>Religious</td>
<td>Tawang is surrounded by Tibet to its north, Bhutan to its southwest and Sela range of West Kameng to its east. Located 10000 feet above mean sea level, Tawang has beautiful lakes around it and is extremely rich in scenic beauty. The Tawang Monastery was founded in the 17th Century in accordance to the wishes of the 5th Dalai Lama.</td>
</tr>
<tr>
<td>Roing (Dibang Valley)</td>
<td>Nature (Biosphere Reserve)</td>
<td>Roing is one of the most important tourist attractions in Arunachal Pradesh. It is located in Lower Dibang Valley. This is an ideal place for nature lovers, adventure seekers and archaeologists. Dihang Dibang Biosphere Reserve spread over 5112 sq. km. is one of the world’s most varied bio-diversity hot spot as it has 8 forest types- Sub-tropical broad leaved, Sub-tropical Pine, Temperate broad leaved, Temperate conifer, Sub-alpine woody shrub, alpine meadow (Mountain tundra), bamboo brakes, and grass lands. It is extremely rich in wild life, bird species and other flora.</td>
</tr>
<tr>
<td>Itanagar</td>
<td>Historical Site</td>
<td>Itanagar has various attractions to offer which include Itanagar Wildlife Sanctuary, Ita Fort, The State Museum, Ganga Lake, Polo Park and a lot more. Itanagar Wildlife Sanctuary is a sprawling sanctuary that houses various species including langur, antelopes, Himalayan black bear, porcupines, goral and many more. Ita Fort is an ancient monument belonging to the 14th and 15th centuries.</td>
</tr>
<tr>
<td>Bomdila</td>
<td>Nature and Religious Site</td>
<td>Situated 8000 feet above sea level, it offers stunning views of the Himalayan snow clad mountains. The Bomdila Monastery also known as Gentse Gaden Rabgyel Lling Monastery is a famous pilgrimage of the Lamaistic faith which belongs to Mahayana Buddhism.</td>
</tr>
<tr>
<td>Ziro</td>
<td>Nature (World Heritage Site)</td>
<td>Ziro is a mesmerizing town surrounded by beautiful pine-clad low hills on all sides. It is also known as the Apatani Plateau. Key attractions at Ziro are the Talley Valley, fish farm, Wild Life Sanctuary and the Bamboo groves.</td>
</tr>
<tr>
<td>Bhalukpong</td>
<td>Adventure Spot and Historical Site</td>
<td>Ideal for adventure sports including hiking, trekking and river rafting, Bhalukpong also has archaeological ruins of king Bhaluka and historical fort among other attractions.</td>
</tr>
<tr>
<td>Pasighat</td>
<td>Nature and Wild Life</td>
<td>This is the oldest town of Arunachal Pradesh and fondly known as the gateway of the Arunachal Pradesh. It is located on the banks of Siang River and 155 meters above the sea level and is rich in natural beauty. Other attractions include Pangin and Daying Ering Wildlife Sanctuary.</td>
</tr>
<tr>
<td>Namdhapa National Park and Tiger Reserve</td>
<td>Wild Life</td>
<td>One can find four species of big cats- Tiger, Leopard, Snow Leopard and Clouded Leopard in addition to the Assamese macaque, pig-tailed macaque, and stump-tailed macaque in the Namdhapa facility. Besides, there are Elephants, black bear, Indian Bison, several species of deers, reptiles and a variety of arboreal animals found in the protected area.</td>
</tr>
<tr>
<td>Anini</td>
<td>Nature</td>
<td>The Town is located atop a Plateau between two tributaries of the mighty Brahmaputra river. Due to its high elevation above sea level, the town enjoys a pleasant climate throughout the year and is a great place to visit with several natural and manmade tourist attractions.</td>
</tr>
<tr>
<td>Along</td>
<td>Nature (Hill Station)</td>
<td>At an altitude of 300 meters from the sea level, it is an enchanting tourist destination surrounded by mountains on all sides. The Kane Wildlife Sanctuary situated here, houses wild species such as elephants and deer. The Hanging Bridge on River Siang is made of cane and bamboo.</td>
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</tbody>
</table>
Assam:

Assam, the gateway to the seven sister NE states is extremely rich in natural scenery, wild life and culture. The land of the red river and blue hills, Assam comprises three main geographical areas: the Brahmaputra Valley which constitutes the expansive wingspan, the Barak Valley extending like a tail, and the intervening Karbi Plateau and North Cachar Hills. It has five national parks two of which have been named World Natural Heritage Sites by UNESCO. It is also a very diverse state with an incredible range of cultures including the flourish of Tantrik Shaktism, Shaivaism and later Vaishnavism. It is also rich in Hindu, Buddhist, Islamic and Sikhism monuments.

Besides nature and culture, one of the world’s largest rivers- the Brahmaputra and its tributaries offers a wide range of water sports. The topography of Assam makes it an ideal destination for trekkers, mountaineers and rock climbers. The hills, in particular, the North Cachar Hills and Karbi Hills are most favourable for trekking and mountaineering.

**Key Tourist Attractions**

| Destination                  | Type                  | Key Highlights                                                                                                                                 |
|------------------------------|-----------------------|----------------------------------------------------------------.Varia:  |
| Kaziranga National Park      | Wild Life and World Heritage Site | Kaziranga National Park has been declared a World Heritage Site. The wild life attractions include the Rhino, Tiger, Bears, Wild Buffalo, Swamp Deer, Gaur, Gibbon, Bengal Florican, Dolphin and Otter among others. |
| Kamakhya Temple              | Religious             | The temple is located on Nilachal Hill, Guwahati at an altitude of 800 feet above sea level and is around 2200 years old. It is an important religious place of the Hindus and attracts thousands of devotees and other tourists every day by its natural grandeur. |
| Dibru Saikhowa National Park | Nature and Wild Life  | This National Park is situated in Tinsukia in Assam. The park is a blend of deciduous forests, semi-evergreen forests and swamp surface making it bio-diverse. Some of the wild species specialties include Ferel horses, Asiatic Wild Buffalo, White winged duck and the Salix swamp. |
### Orang National Park

It is the only National Park in the country which has been created naturally. Some of the wild life found here includes the royal Bengal tiger, one horned rhinoceros, leopard and elephant among others. The place offers great delight to bird watchers as one could find various local birds and migratory birds here.

### Haflong

Haflong is Assam’s only hill station where one can see the Rainbow down below and is famously called the ‘Switzerland of the East’. The picturesque landscape comprises blue hills, large and beautiful lakes, enthralling streams, waterfalls and abundance of pineapple trees and orange trees. The famous ‘Haflong’ lake is also located in the Haflong town.

### Umrangshu

Umrangshu has picturesque beauty with hills and lush greenery. The hot spring Garampani, attracts many tourists for its medicinal value. Kapili Hydel Power Plant is situated near the border and has emerged as a tourist spot. There is also an opportunity for trekking from Haflong Hill to Umrangshu.

### Dibrugarh

The town is home to a series of tea gardens with attached golf courses attached to them. This provides a remarkable experience for golf enthusiasts.

### Diphu

Diphu Hill Station is the Head Quarter to Karbi Anglong District and is 271 km from Guwahati by road. The town offers 13 hectares of lush greenery, a botanical garden and a district museum of archaeological importance.

### Brahmaputra Cruise

The Brahmaputra is the longest river in the country and cruising on the river that flows through the rich beauty of Assam is a unique experience. It offers tea garden visits, wildlife viewing and exploring villages and towns.

### Majuli

Majuli is the largest freshwater island in South Asia on the Brahmaputra River. It is famous for its Vaishnavite Satras such as Kamalabari Satra, Dakhinpat Satra, Garamurh Satra, Auniati Satra, Bengenaati Satra and Samaguri Satra.

### Meghalaya

Meghalaya or ‘the adobe of clouds’ in Sanskrit is compared to Scotland for its highlands, fog and scenery. It has some of the thickest primary forests in the country and therefore constitutes one of the most important ecotourism circuits in India. The Meghalaya subtropical forests support a vast variety of flora and fauna. The state has 2 National Parks and 3 Wildlife Sanctuaries.

Besides its natural beauty, Meghalaya also offers many adventure tourism opportunities in the form of mountaineering, rock climbing, trekking and hiking, caving (spelunking) and water sports. The state offers several trekking routes, some of which also afford an opportunity to encounter rare animals. The Umiam Lake has a water sports complex with facilities such as rowboats, paddleboats, sailing boats, cruise-boats, water-scooters and speedboats.
### Key Tourist Attractions

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<tr>
<td>Cherrapunji Living Root Bridges</td>
<td>Eco-Tourism</td>
<td>The unique tourist attraction of Cherrapunji region are the authentic Root Bridges - the living fig tree roots that ingenious Khasi villagers have trained across streams to form pathways. The root bridges are grassroots bioengineering marvels. These are absolutely unique attractions not seen in any other tourist destination.</td>
</tr>
<tr>
<td>Mawlynnong Village</td>
<td>Eco-Tourism</td>
<td>Mawlynnong Village has earned the distinction of being the cleanest village in India. It is situated 90 km from Shillong and besides the picturesque village, offers many interesting sights such as the living root bridge and another strange natural phenomenon of a boulder balancing on another rock.</td>
</tr>
<tr>
<td>Mawphlang Sacred Grove</td>
<td>Eco-Tourism</td>
<td>Mawphlang Sacred Grove is one of the largest sacred grove (in area) existing in the contemporary world. They are protected by local communities. This guardianship creates a sacred area where nature and wildlife thrive. It’s a scenic nature destination.</td>
</tr>
<tr>
<td>Mawsmai Caves</td>
<td>Eco-Tourism and Adventure Tourism</td>
<td>Meghalaya is known for its caves with more than 1000 caves found so far. The Mawsmai caves near Cherrapunji are the most frequently visited due to its relatively easy accessibility. Other caves found in Siiju, Mawmluh, Mawsynram, and Liat Prah (the longest cave in India) are ideal for adventure expeditions.</td>
</tr>
<tr>
<td>Garo Hills</td>
<td>Nature</td>
<td>The entire Garo Hills having an area of approximately 8,000 sq km is densely forested and hence one of the richest spots in biodiversity. Tourist destinations can be accessed through the headquarters Tura which includes the Tura Peak, the Nokrek Biosphere, Siiju Wildlife Sanctuary and Balpakram National Park.</td>
</tr>
</tbody>
</table>
Mizoram:

The state of Mizoram is renowned for its dramatic landscape and pleasant climate. The state is rich in bird diversity, which has the potentiality to make it a major birding destination. It is also famous for the Wild Water Buffalo, Rhinoceros and wild Elephants.

Key Tourist Attractions

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<tr>
<td>Aizwal</td>
<td>Nature</td>
<td>Aizwal, the state capital is located in a picturesque setting on the ridges of hills at an altitude of 1132 m above sea level overlooking valley and hill ranges beyond. Some of the tourist spots in the city include Durtlang Hills, Tamdil Lake, Mizoram State museum, Khawnlung wildlife sanctuary and Luangmual handicrafts centre.</td>
</tr>
<tr>
<td>Champhai</td>
<td>Nature</td>
<td>Champhai overlooks the largest plains in the state of Mizoram. It offers a spectacular view of Myanmar’s hill ranges. It is famously referred to as the ‘Fruit Bowl of Mizoram’. It is also home to ancient relics and monuments which reflect the rich past of the land. Some of the leading tourist spots include Murlen National Park, Rih Dil Lake, Kawlkulh, Lengteng Wildlife Sanctuary and the Phawngpui Peak.</td>
</tr>
<tr>
<td>Lunglei</td>
<td>Nature</td>
<td>Lunglei is located at a higher altitude than the state capital and derives its name from a rock resembling a bridge here. It is an ideal location to have some of the most spectacular views the state can offer. Majestic hills, lush greenery and rich culture of the land attract tourists in great numbers.</td>
</tr>
<tr>
<td>Serchhip</td>
<td>Nature</td>
<td>Located between Mat and Tuikam Rivers, Serchhip is home to the state’s highest waterfalls and hills. A wide range of endangered species is found here. The district shares borders with Myanmar. Thenzawl, a town in Serchhip houses Mizo handloom industry where traditional items are available.</td>
</tr>
<tr>
<td>Lawngtla</td>
<td>Nature</td>
<td>Lawngtla shares its boundaries with the neighboring country Bangladesh. The western side of the district is covered by dense unexplored forests. It is ideal for visitors who are looking for a place to enjoy oneness with nature and limited sightseeing destinations. Other tourist spots include the Vengpui Peak and three wildlife sanctuaries.</td>
</tr>
</tbody>
</table>
Manipur:

Manipur is bounded by Nagaland to the north, Mizoram to the south, and Assam to the west; Myanmar lies to its east. It has for long connected Indian subcontinent to Southeast Asia, enabling migration of people, cultures and religions. Its people include the Meetei, Kuki, Naga, Pangal, Gorkhali and Bishnupriya Manipuri, who speak different types of Sino-Tibetan languages. The state has also witnessed many wars, including fighting during World War II. It has a rich culture featuring martial arts, dance, theatre and sculpture.

Key Tourist Attractions

<table>
<thead>
<tr>
<th>Destination</th>
<th>Type</th>
<th>Key Highlights</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keibul Lamjao National Park</td>
<td>Wild Life</td>
<td>It is the only floating park in the world and is the last natural habitat of the ‘Sangai’ (Brow-antlered deer). The park contains many exclusive species of flora and fauna including the Brow-antlered deer, Hog deer, Wild boar, large Indian Civets, common otter, fox, jungle cat, golden cat, Bay bamboo rat, musk shrew, common shrew, flying fox and Sambar.</td>
</tr>
<tr>
<td>Loktak Lake</td>
<td>Nature</td>
<td>Loktak Lake is one of the enchanting places to visit in the northeast. Almost two-thirds of this huge expanse of fresh water is covered by unique floating islands which are locally called as phumdi and are home to a community of fishermen. The lake is a rich bio-diverse area and is home to a huge number of unique flora, fauna and avifauna making it a picturesque spot.</td>
</tr>
<tr>
<td>Govindjee Temple</td>
<td>Culture and Religious</td>
<td>Built in the 18th century under the rule of Rajarishi Bhagyachandra, Shri Govindjee Temple is simple in design and is built with bricks and Burma teak. The main deity of the temple is carved out from the bark of a jackfruit tree which is an incarnation of Lord Vishnu. The place is often populated by tourists and the main hall is a frequent spot for various cultural celebrations.</td>
</tr>
<tr>
<td>Manipur State Museum</td>
<td>Historical Site</td>
<td>The Manipur State Museum is a treasure trove of the state’s rich cultural heritages. It has a fine collection of regional costumes; war implements, historical documents and relics, and offer a glimpse of the state's glorious past.</td>
</tr>
<tr>
<td>Dzoku Valley</td>
<td>Nature</td>
<td>The Dzoku valley is the most picturesque place in Senapati District bordering Nagaland. It is famous for its rare terrestrial lily called “Dzuko Lily”. The valley is a photographer’s paradise and is a breathtakingly beautiful picnic spot with its rich cover of seasonal flowers and other flora and fauna.</td>
</tr>
<tr>
<td>Sadu Chiru Waterfall</td>
<td>Nature</td>
<td>The waterfall consists of three different falls with the first one being 30 meters high. The vicinity of the falls is lush green and offers a serene and playful environment to its visitors.</td>
</tr>
</tbody>
</table>
Sikkim:

Sikkim is a thumb-shaped state surrounded by vast stretches of Tibetan Plateau in the North, Chumbi Valley of Tibet and the kingdom of Bhutan in the east, Darjeeling district of West Bengal in the south and the kingdom of Nepal in the west. Sikkim constitutes 0.22% of the total geographical area of India but is one of the prominent destinations for travel enthusiast because the Himalayan environment, gurgling streams, snow capped mountains, its richness of culture, monasteries, flora and fauna.

Key Tourist Attractions

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>Monasteries</td>
<td>Religious</td>
<td>More than 200 monasteries dot the divine hill state of Sikkim. The most visited monasteries in Sikkim are Rumtek (overlooking Gangtok), Pemayangtse (near Pelling in West Sikkim), and Tashiding (West Sikkim). They are ideal places for meditation and are also centres of many Buddhist festivals especially during the December –March period</td>
</tr>
<tr>
<td>Yuksom and Dzongri Trail</td>
<td>Adventure</td>
<td>Sikkim is an ideal region for a variety of adventure sports including trekking, mountaineering and rafting. The Yuksom to Dzongri peak is the most popular trek. It passes through the unspoiled forests, magnificent rhododendron gardens, and powerful rivers of Kachenjunga National Park.</td>
</tr>
<tr>
<td>Teesta River</td>
<td>Adventure</td>
<td>The Teesta River offers some world class opportunities of river rafting. Grade 2 to 4 rapids are interspersed with placid patches to float along, and plenty of white sandy beaches exist for overnight camping. The best time for rafting in Sikkim is from March to May and October to December.</td>
</tr>
<tr>
<td>Flora and Fauna Sanctuaries</td>
<td>Nature</td>
<td>Sikkim is renowned for its astounding variety of birds, animals, and flowers -- over 450 species of birds, 400 species of butterflies, 450 varieties of orchids, and 40 species of rhododendron. Two of the best places to see them are the Deorali Orchid Sanctuary in south Gangtok, and Kyongnosia Alpine Sanctuary around an hour from Gangtok on the way to Tsomgo Lake and Nathu La.</td>
</tr>
<tr>
<td>Nathu La Pass</td>
<td>Adventure</td>
<td>The Nathu La Pass is three hours journey along the Old Silk Route and is the border between the India and China. The border consists of a lone barbed wire fence, and one can experience the strange thrill of seeing an international border.</td>
</tr>
</tbody>
</table>
Nagaland:

Nagaland borders the state of Assam to the west, Arunachal Pradesh and part of Assam to the north, Myanmar to the east and Manipur to the south. It is considered to be a mysterious tribal land inhabited by 16 major tribes. Each tribe is unique in character with its own distinct customs, language and dress. Nagaland is rich in flora and fauna. About one-sixth of Nagaland is under the cover of tropical and sub-tropical evergreen forests—including palms, bamboo, rattan as well as timber and mahogany forests. While some forest areas have been cleared for ‘jhum’ cultivation, many scrub forests, high grass, reeds; secondary dogs, pangolins, porcupines, elephants, leopards, bears, many species of monkeys, sambar, harts, oxen, and buffaloes thrive across the state’s forests. The Great Indian Hornbill is one of the most famous birds found in the state.

Key Tourist Attractions

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<tbody>
<tr>
<td>Dimapur</td>
<td>Historical</td>
<td>Dimapur has mysterious 13th century ruins from the Karachi civilization, which ruled there until the Nagas came down from the hills and took over. There’s also a Wednesday market close to the ruins, which provides an insightful look at Nagaland life and culture.</td>
</tr>
<tr>
<td>Kisama and Khooma Villages</td>
<td>Culture and Heritage</td>
<td>Kisama Heritage Village is 10 kilometers from Kohima. The village has an open air museum and a collection of traditional style tribal Nagaland buildings. Khonoma village, home to the Angami tribe, is located around 20 kilometers from Kohima. This presents an opportunity to understand village life and the local culture by staying in one of the rustic home stays there.</td>
</tr>
<tr>
<td>Mokokchung town</td>
<td>Culture and Heritage</td>
<td>The district is home to the Ao tribe, which holds their celebratory Moatsu Festival during the first week of May each year. One can absorb the tribal culture here</td>
</tr>
<tr>
<td>Flora and Fauna Sanctuaries</td>
<td>Nature</td>
<td>Sikkim is renowned for its astounding variety of birds, animals, and flowers -- over 450 species of birds, 400 species of butterflies, 450 varieties of orchids, and 40 species of rhododendron. Two of the best places to see them are the Deorali Orchid Sanctuary in south Gangtok, and Kyongnosia Alpine Sanctuary around an hour from Gangtok on the way to Tsonmo Lake and Nathu La.</td>
</tr>
</tbody>
</table>

6 Jhum or Slash-and-burn is a subsistence agricultural technique that involves the cutting and burning of plants in forests or woodlands to create fields.
Tripura:

Tripura is the third-smallest state in the country and is bordered by Bangladesh to the north, south, and west, and the states of Assam and Mizoram to the east. It lies in a geographically disadvantageous location in India and only one major highway, the National Highway 44, connects it with the rest of the country. Mainstream Indian cultural elements, especially from Bengali culture, coexist with traditional practices of the ethnic groups, such as various dances to celebrate religious occasions, weddings and festivities.

**Key Tourist Attractions**

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</tr>
</thead>
<tbody>
<tr>
<td>Udaipur</td>
<td>Religious and Nature</td>
<td>Udaipur place is one of the famous tourist attractions of Tripura. The town is renowned for the Tripura Sundari and Bhubaneswari temples and the Sepahijala wild life sanctuary.</td>
</tr>
<tr>
<td>Unakoti</td>
<td>Religious</td>
<td>Unakoti is reputed for its 7th - 9th century AD stone and rock cut images, deep in the forests near Kailashahar. There is a predominant influence of Hindu deity Shiva on the heritage and also the influence of Tantric, Shakti and Hatha yogis.</td>
</tr>
<tr>
<td>Dumboor Lake</td>
<td>Nature</td>
<td>Dumboor Lake destination tour includes a lake trip of 48 islands and a hydel project located close to it. The rivers Raima and Sarma converge at this lake. The lake also acquires a rich reservoir of natural and cultured fishes.</td>
</tr>
</tbody>
</table>

**3.2 Infrastructure Analysis**

Tourism provides direct benefits to the local community and businesses. The infrastructure required by tourism—transport, communications, water supply and health services—also benefits local communities and can be used for other activities like speeding disaster relief, providing for the local population and fuelling the overall development of a state.

**A. North East Infrastructure Analysis**

**Terrain:** About 70% of North East is hilly region, and the topography varies within each state. Mountains and hills cover most of Arunachal Pradesh, Mizoram, Nagaland, Meghalaya and about half of Tripura, 20% of Assam, 90% of Manipur and almost entire Sikkim. The plains of the region are mainly made up of separate landmasses - the Brahmaputra Valley and the Barak Valley in Assam and the Tripura plains in the South. In Manipur, the valley is small, comprising only about 10% of the total area of the State. The Brahmaputra Valley stretches longitudinally for about 730 km, from North Lakhimpur to Dhubri districts in Assam. The Barak Valley, formed by the river Barak and its tributaries covers the districts of Cachar, Karimganj and Hailakandi of South Assam.

**Accessibility:** Barring Assam the only proper connecting medium is via roadways. Recently the airline service has also developed its wings to improve the connectivity of the states with the rest of the country. The flying condition of this hilly sector of the North East States is very difficult due to high and low mountain ranges which are covered by mists and low clouds. Due to this reason, some states are connected by the flight services during the winter season only. Further, some locations are connected during the monsoon season only. The connectivity through waterways is done only in Assam as also by railways.
The North East Region is the home to extraordinarily diverse mosaic of ethnic groups having distinctive social, cultural and economic identity. Most of the states in North East are tribal dominated. The states having more than 50% tribal population include Arunachal Pradesh (64.2%), Meghalaya (85.9%), Mizoram (94.5%) and Nagaland (89.1%) according to the Census of India. More than 220 ethnic groups with equal number of dialects makes it hugely diverse region.

The ecology, lifestyle and economy of the region have been shaped by the major rivers of the region - the Brahmaputra; the Barak ranges of mountains; thick tracks of jungles and heavy monsoons. The economy of the region is still primarily agrarian but its full potential is yet to be exploited. Agriculture provides livelihood support to 70% of the population of NER. The industrial sector has mainly grown around tea, crude oil, natural gas, mining; saw mills and steel fabrication units are also functional in select areas.

**Connectivity:** The connectivity to the NE region is primarily through air. Other than Assam, other NE states like Meghalaya (Imphal), Meghalaya (Umroi), Mizoram (Aizwal) and Tripura (Agartala) are well connected by air. Arunachal Pradesh is connected by helicopter services. However, the flying condition of this hilly sector of the North East States is very difficult due to high and low mountain ranges.

Therefore, roadways are the primary mode of connectivity in the NE region. However, there is immense scope of improvement in road connectivity. The presence of national highway is quite negligible in most of the NE. The Centre has envisaged connecting the NE state capitals to the EW highway through the Seven Sister’s Corridor project. This will link the capitals of the seven states and the border points of Bhutan, Bangladesh and Myanmar. The corridor will connect India’s Northeast to its mainland through a 3,300 km long four-lane highway between Porbandar (Gujarat) and Silchar (Assam). However, progress on the ground is difficult to achieve due to issues related to land acquisition (lack of land records), hilly terrain and the economic costs related to procuring material from far flung areas.

For greater economic integration, there is a strong need to first integrate the market in the NE, to make it an attractive hub for the Southeast Asian and Chinese businesses. This would not only provide economic impetus but also open the doors for more activities including tourism.

**Other Social Infrastructure:**

**Education:**

The rate and standard of literacy in the NE region exceeds the national average. However, its potential is still to be realized as the employability in skill intensive industries is low due to inadequate access to quality education and vocational skills. To realize the economic potential the region holds, it is imperative to utilize the demographic advantages and parameters that will lead to market linked skill development.

The expansion of the tourism and hospitality industry, which has great potential in the region, could provide a great opportunity for employment of a large number of trained personnel including women. Similarly, increasing training opportunities in nursing can expand productive employment opportunities for women in the region.

Another area for specialized skills in the region could be forest management. The NER forest resources are facing degradation and deforestation. Large investment outlays for capacity building of knowledge and skills centers aimed at preserving the ecology are required.
**Specialized Institutions:** Institutions of higher education focusing on environment sciences (viz. forest sciences, social forestry, botany, environment and ecology sciences, etc.) need to come up for building local community awareness to ensure conservation of NER’s forest resources. The Government of India has sanctioned an amount of Rs. 100 crore for establishing a Sports University in Manipur to promote and harness the Sports culture of the region.

**Healthcare:** there has been a steady improvement in rural healthcare infrastructure [sub-centers, Primary Healthcare Centre (PHCs) and Community Healthcare Centre (CHCs)] after the implementation of the National Rural Health Mission (NRHM) in 2005. However, much needs to be achieved to bring the region at par with the national average. All NE states except Mizoram face acute shortage of rural healthcare infrastructure to the tune of 20-50% in terms of units. Moreover, the quality of healthcare services has remained suspect due to unavailability of trained manpower across the region. There is a crisis situation if we look at the availability of Specialists and Radiologists in the region. Arunachal Pradesh and Nagaland for instance have almost no specialist presence at the CHC level.

**B. Eastern India Infrastructure**

**West Bengal:**

**Roadways:** The state has a wide network of National and State Highways and most of all the tourist destinations are easily accessible by road. To fill the last mile gap for tourists to reach Sunderbans and Sagar Island, there are motor launches and mechanized boats. The total length of National Highways passing through the state is 2,393 km and also the state has the higher road density than the country’s average.

**Railways:** The state has a total railway network of 3,681 km. Howrah and Sealdah in Kolkata and New Jalpaiguri are the major railway hubs of the state. These stations are well connected to almost all the parts of the country including north east and also all tourist destinations within the state.

**Airports:** Netaji Subhas Chandra Bose Airport in Kolkata is the only international airport in the state linking various global destinations by direct flights. In addition there is a domestic terminal at Kolkata and Bagdogra which are connected almost all major cities in the country. The Cooch Behar airport has recently been made operational by Airports Authority of India.

**Seaways:** The state has two modern ports at Kolkata and Haldia. Kolkata is the fifth largest port in the country and is connected to Andaman & Nicobar Islands through frequent ship services.

**Bihar:**

**Roadways:** The state has a vast network of roads varying from 3642 km of National Highways, 3989 km of State Highway, 8156km of Major District Roads, 3818km of Other District Roads and Village roads of 63262km, respectively. The east-west high-speed corridor (four-lane) and the golden quadrilateral road pass through cities of Bihar (Muzaffarpur-Darbanga-Purnia NH-57).

**Railways:** The state has good inter-state and intra-state railway connectivity with direct connections to Kolkata, Delhi and Mumbai. Patna, Gaya, Bhagalpur, Muzaffarpur, Darbhanga, Katihar, Barauni and Chhapra are Bihar’s best-connected railway stations. Airports: Bihar has two operational.

**Airports:** Lok Nayak Jayaprakash Airport at Patna and Gaya Airport, Gaya. While Patna airport is connected to all major cities (Delhi, Mumbai, Kolkata, Lucknow, Bangalore, Hyderabad, Chennai, Pune and Ranchi), Gaya is an
international airport and well connected with Colombo, Singapore, Bangkok etc. Patna airport is categorized as a restricted international airport, with customs facilities to receive international chartered flights. Apart from this, many of the district headquarters have airstrips or aerodromes.

**Odisha:**

**Roadways:** The state has around 242,736 km of roads including 3,704 km of National Highways and 5,102 km of State Highways. The state is well connected to its neighboring states and other parts of India through 15 National Highways.

**Railways:** The state falls in the East Coast Railways region, with major divisions at Khurda Road, Sambalpur, Waltair, and Bhubaneswar. The total railway route length in Odisha is over 2,439 km, including 54 km of narrow gauge. Odisha serves as a critical link between Eastern and Western India through the railway network of the South Eastern Railways and the East Coast Railways. The Talcher-Sambalpur line provided the vital link between coastal and Western Odisha.

**Airports:** the Biju Patnaik Airport located in the state capital, Bhubaneswar is the only domestic airport in the state. Direct links are available from Bhubaneswar to destinations such as New Delhi, Kolkata, Chennai, Nagpur, Mumbai and Hyderabad. In addition, there are 17 airstrips and 16 helipads at several places in the state. Airports Authority of India is planning to modernize, expand and operate the Jharsuguda Airport, in light of the industrial hub which is being built near the airstrip.

### 3.3 Creating Niche Circuits: Focus on West Bengal, Bihar and Odisha

**West Bengal:**

West Bengal has the potential to become one of the most favourable tourist destinations in India. The state possesses a bounty of natural resources and a rich heritage, making it a land full of opportunities for tourism related activities. It has a wide range of tourism products, and hence is an attractive destination that caters to both domestic and foreign tourists. Developing the tourist circuits and related products is a worthwhile investment as the sector has huge prospects in making significant contributions to the state economy.

Nature based tourism is key to the development and the promotion of Tourism in West Bengal. The presence of a large coastline and several other water bodies, tea plantations, mountains, aesthetic beauty and rich flora and fauna gives the state a strong position in eco-tourism.

**Figure 8: Tourist Arrivals in West Bengal (mn)**

![Tourist Arrivals in West Bengal (mn)](chart)

*Source: Department of Tourism, Govt. of West Bengal*
West Bengal overall had ~26.79 mn tourist visits in 2013 contributing 2.3% of India tourist visits. This has seen a 10 year CAGR growth of 8.5% vs. GDP growth CAGR of 6.85% over the same period signifying the importance of the sector to the state economy. It is ranked 9th in terms of domestic tourist visits (2013) with a total of ~25.5 mn in 2013 and a share of 2.2%. The top three states (Tamil Nadu, Uttar Pradesh and Andhra Pradesh) account for ~45% of total visits.7

In terms of foreign tourists’ arrivals, West Bengal fares better and is ranked 6th with 1.25 mn visitors in 2013 and overall state share of 6.2%.

<table>
<thead>
<tr>
<th>Thematic Circuits</th>
<th>Major Destinations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Circuit 2 Pilgrim Tourism</td>
<td>Ganga Sagar – Birbhum (Tarapeeth – Bakreshwar – Nalhati – Fullura – Saithia –</td>
</tr>
<tr>
<td></td>
<td>Kankalitala), Tarakeswar, Furfura Sharif</td>
</tr>
<tr>
<td>Circuit 3 Nature Tourism</td>
<td>Dooars and Darjeeling Circuit</td>
</tr>
<tr>
<td>Circuit 4 Sunderbans</td>
<td>Gadkhal, Jharkhal, Koikhali, Frazergan</td>
</tr>
</tbody>
</table>

Source: West Bengal Tourism Development Corporation

Bihar:

The state of Bihar with its rich heritage, cultural diversity and geographical variations has great potential for tourism industry and making it attractive for internationals tourists. The state government is making endeavors to develop tourism in a systematic manner in order to position it as a major engine of economic growth and harness it for more revenues and employment. All major religions of India have left their mark in the state and this has made Bihar a great religious melting pot. The state is birth place for Buddhism and Jainism, and world famous Buddhist sites such as ‘Mahabodhi’ Temple of Bodh Gaya, Nalanda University and Vaishali stupa are located here. In addition to the Buddhist tourism, the state has also on offer Sufi, Sikh, and Jain tourist circuits.

Figure 9: Tourist Arrivals in Bihar (mn)

Source: Bihar Tourism Statistics

7 Ministry of Tourism, Government of India
The state government has been nurtured tourism industry and due to which the overall footfall of international tourists has increased manifold. The number of foreign tourists visiting the state has grown six times from 1.77 lakh in 2007 to 11 lakh in 2012, and during the same period the number of domestic tourists more than doubled. With a share of 3.8% of overall international tourist arrivals, the state stood 8th the in country.

The main competitive constraints faced by the tourism sector in Bihar have been the poor quality of the environments surrounding many of state’s main tourist sites, the security scenario in the state, the quality of facilities and services at tourist attraction places, the quantity and quality of transportation service and related infrastructure, limited availability of tourist information in-source markets and at destination. In order to revamp its image as a major tourist destinations, the tourism department is planning to commemorate world famous Sonepur Mela – Asia’s largest cattle fair, organizing Rajgir Mahotsav and other festivals at a global level.

### Major Tourism Circuits in Bihar

<table>
<thead>
<tr>
<th>Thematic Circuits</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Sufism</td>
<td>Maner Sharif (Patna, Maner), Khankah Mujibia (Phulwari Sharif, Patna), Khankah Emadia (Mangal Talab, Patna), Dargah Sharif, Mithan Ghat (Patna City, Patna), Hajipur Karbala (Vaishali), Hasanpura (Siwan), Bibi Kamaal Sahiba (Kako, Jehanabad), Bari Dargah (Bihar Sharif, Nalanda) and Chhoti Dargah (Bihar Sharif, Nalanda)</td>
</tr>
<tr>
<td>Gandhism</td>
<td>Motihari (East Champaran), Betia (West Champaran), Bhitharwa Ashram (West Champaran), Brindaban (West Champaran), Sadaquat Ashram (Patna), Gandhi Sangrahaly (Patna Museum)</td>
</tr>
<tr>
<td>Eco-Tourism or Nature &amp; Wildlife Circuit</td>
<td>Rajgir Sanctuary-Bhimbandh sanctuary (Munger)- Vikramasila sanctuary Udaipur Sanctuary- Kaimur Sanctuary- Gautam Buddha Sanctuary - Nakti Dam Sanctuary-Gogabill Sanctuary-Valmiki National Park-Kakolat (Nawada)</td>
</tr>
</tbody>
</table>

*Source: Bihar State Tourism Development Corporation*

**Odisha:**

Odisha, a maritime State, located on the east coast of India is bounded by West Bengal and Jharkhand on the North, Andhra Pradesh on the South, the Bay of Bengal on the East and Chhattisgarh on the West. The state bears the essence of rich tourism sector with its age old cultural heritage, a myriad of monuments and nature’s bounties like beach resorts, eco-tourism, flora and fauna, biodiversity, national parks and sanctuaries. The state has also achieved worldwide recognition for its works of Appliqué, Metal Crafts, Silver Filigree, Patta Chitra, Pipili Chandua, Sambalpuri Bastralaya. In recent times more and more tourists are visiting the state to witness its tribal culture, the Rath Yatra and Konark sculptures.
Tourism has huge potential in the state, and being a labour-intensive activity will be able to generate large scale employment, tourism revenue and value addition to the economy. However the sector remains relatively less developed in comparison to other states, with less than 1% share of foreign tourism arrivals. In terms of overall tourism arrivals in the state, it has been growth rapidly at an approximate CAGR of 7.3% over the period of 2009-13. Most domestic tourists to Odisha come from West Bengal and Andhra Pradesh constituting about 14.6% of overall.

The State Government on its part has identified several festivals including the Rath Yatra, Konark Festival, National Crafts Mela, Mukteswar Dance Festival and other festivities as state-level festivals for attracting tourists, giving considerable scope for religious and recreational tourism. The state is yet to fully realize the potential of tourism, both in respect of domestic and foreign tourist visits.

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>Circuit 1 Golden Triangle Circuit</td>
<td>Bhubaneswar-Konark-Puri-Chilika Lake – Dhauliagiri-Ratnagiri-Lalitgiri-Udaygiri-Langudi and back to Bhubaneswar Gopalpur as Optional</td>
</tr>
<tr>
<td>Circuit 2 Tribal Circuit</td>
<td>Bhubaneswar-Phulbani-Daringibadi-Chandragiri-Taptapani-KoraputJyepore - Rayagada-Nawrangpur-Malkanigiri-Gupteswarand back to Bhubaneswar via Koraput)</td>
</tr>
<tr>
<td>Circuit 3 Eco Circuit:</td>
<td>Baripada-Similipal – Talsari – Dogra – Chandipur - Bhitarkanika – Kuldiahand complete the circuit at Balasore</td>
</tr>
<tr>
<td>Circuit 4</td>
<td>Cuttack-Dhenkanal-Deogarh-Sambalpur – Hirakud Dam –Nrsinghanath – HarishankarBoudh-Sonpur-Daspallah-andcomplete the circuit at Bhubaneswar</td>
</tr>
</tbody>
</table>

*Source: Odisha State Tourism Development Corporation*

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*Odisha Economic Survey 2012-13*
3.4 Tapping the Hidden Treasure: Focus on the North East

Even after 68 years of independence, the North Eastern states of India continue to lag behind the rest of India in economic and social development and integration. Tourism has the potential to emerge as a critical instrument to realize the NE Vision 2020 envisaged by the Ministry of Development of North Eastern Region, Government of India and India’s Look East Policy. Developing relevant tourism infrastructure is vital to improve connectivity with the rest of the country and also open avenues for developing links with neighboring south east countries. The key recommended aspects to tap the unexplored potential of the region are:

Unified Marketing Strategy: The North East is one of the most unexplored tourism destinations and this theme has been picked as its unique selling point. As a tourism attraction, the ‘unexplored’ aspect a brand for itself will help create an association with the tourist community by influencing and attaching itself to their image of the place, thoughts, feelings, perceptions, experiences and beliefs towards it. Creation of a unified marketing strategy is therefore the first step to realize the full potential of the unexplored natural beauty of the region:

Paradise Unexplored Campaign: the Government of India has launched the ‘Paradise Unexplored’ branding for tourism in the NE under the Incredible India umbrella.

This was undertaken as it was felt that the North East Region has been unable to gain adequately from the Incredible India umbrella campaign.

Moreover, as part of the strategy to market the region, the Government is hosting a series of international tourist marts in the region. The objective of the Marts is to showcase the tourism potential of North Eastern States of India at the international level. The latest of the International Tourism Mart was organized in Shillong, Meghalaya in October 2014. Over 50 buyer delegates from ASEAN and SAARC countries, Japan, Korea, Australia, France, Spain, Russia, Germany, Italy, Switzerland, Sweden, U.K. and USA participated in the Mart.

The first two editions of the International Tourism Mart were held at Guwahati, Assam and Tawang, Arunachal Pradesh. The events were planned and scheduled to facilitate interaction between buyers, sellers, media, Government agencies and others.

North East as an experience is the sum total of breathtaking and scenic hills and waterfalls, historical monuments and sites, religious places of worship and mythological associations, diverse flora and fauna, tea estates and cultural richness. As there are lot of tourist destinations within the region and nearby, potential of developing circuits within and with North Eastern Region needs to be explored. This would help in attracting more tourists to North Eastern Region and increasing their duration of stay.

North-East Tourism Policy: Development of an integrated NE Tourism Policy with better on-ground coordination (road maintenance, civil works and tourism infrastructure) is required for wholesome development of destinations especially in unexplored stretches of the region and more equitable distribution of tourist visits across the region. While the existing schemes focus at destination or circuit development, adequate emphasis is required to be put on infrastructural requirements.
There is a strong need for development of packaged tours for the NE region to provide the inquisitive traveller a flavour of the entire region. This is also necessary to tide over issues of planning and overtly expensive private cab travel within the region.

**Development of select tourist mega destinations:** within the ambit of an umbrella branding exercise, there is a need to identify key destinations with huge potential and develop them as model destinations to create a positive image for the region. Some of the potential circuits could be:

- Ziro to Pasighat in Arunachal Pradesh promoting Tawang as an international tourist and spiritual destination
  - The government has initiated a drive to develop Tawang as a tourist destination which would also include commencement of the Ugyen Sangpo heliport and improved road connectivity besides the tourism infrastructure.
- Mechuka, Balpakaram and Mon in Nagaland which are better connected to the mainland through Assam and tourism flow can be facilitated by better connectivity.
- Haflong in Assam as a world class hill station. Some interventions in this direction could be beautification of the area, development of eco-resorts and other accommodation infrastructure and improving rail and road connectivity
- Jumbur (Jampui) Hills in Tripura as an exquisite destination for nature lovers driven by its wonderful sunrise and sunset views, panoramic views of the valley and the villages of Mizoram.

Implementation of these mega destinations has to be undertaken on a mission/project mode. Unlike other tourism destination planning, infrastructures like roads and civil amenities have to be part of the project for which the state government has to actively coordinate with the centre. One possible option could be development of a SPV for large projects.

**Identification of sites that can get World Heritage Sites recognition** needs to be undertaken for additional image building and realizing the full potential. Considering the enormous natural wealth and bio-diversity, the region’s two heritage sites (Kaziranga and Manas) can grow manifold.

**Government Interventions:** Some fundamental government interventions are required to not only boost tourism but help in overall socio-economic integration of the region with the rest of the country:

- **Promotion of indigenous crafts:** the exclusive bamboo/cane based handicrafts of the region would directly benefit the artisans and add another dimension to the tourist attractions of the NE region.
  - Utilizing the growth of e-commerce to connect the artisans with the end consumer
  - Organizing exclusive NE handicraft exhibitions as standalone events in various parts of the country.

**Develop Niche Tourism Products:** In addition to the existing offerings which revolve around the eco-tourism theme, there is a lot to be explored in terms of new tourism offerings which exist in the region in their various forms but require proper efforts in terms of development, packaging and promotion.

- **Culture and Rural Tourism:** Festivals are key to promoting the rich cultural heritage of the North-East. They also have the potential to extend tourist seasons, peak seasons and introduce a ‘new season’ for a destination. They have great curiosity factor which captivates the domestic and international tourists.
**Horn Bill Festival:** the Horn Bill festival is organized by the State Tourism and Art & Culture Departments, Government of Nagaland to showcases a mélange of cultural displays under one roof. The Festival is named after the Indian Hornbill, the large and colourful forest bird which is displayed in folklore in

This festival usually takes place in the first week of December every year in Kohima. All the tribes of Nagaland take part in this festival. The aim of the festival is to revive and protect the rich culture of Nagaland and display its extravaganza and traditions. It provides a unique opportunity to experience the food, songs, dances and customs of the Naga tribes provided by a colourful mixture of dances, performances, crafts, parades, games, sports, food fairs and religious ceremonies. The festival was inaugurated by the Hon’ble PM of India in 2014 as a series of steps by the Government to promote NE as a tourist destination.

The **Sangai Festival** is an annual cultural festival organised by Manipur Tourism Department every year around the later half of November. This has been named as the Sangai Festival to stage the uniqueness of the shy and gentle brow-antlered deer popularly known as the Sangai Deer, which is the state animal of Manipur. It showcases the best of what the state has to offer to the world in terms of art and culture, handloom, handicrafts & fine arts, indigenous sports, cuisines & music, eco & adventure sports as well as the scenic natural beauty of the land.
Religious Tourism: The region has many famous and old religious spots, which can be integrated through a circuit by provision of tourist amenities and separate focus in the NE Tourism policy. Some of the key destinations identified by the Government to be promoted on a wider canvas are:

<table>
<thead>
<tr>
<th>Destination</th>
<th>State</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tawang</td>
<td>Arunachal Pradesh</td>
<td>Buddhist Tourism</td>
</tr>
<tr>
<td>Bomdila Monastery</td>
<td>Arunachal Pradesh</td>
<td>Buddhist Tourism</td>
</tr>
<tr>
<td>Dhubri Buddhist Temple</td>
<td>Assam</td>
<td>Buddhist Tourism</td>
</tr>
<tr>
<td>Kamakhya Temple</td>
<td>Assam</td>
<td>Hindu Centre of worship</td>
</tr>
<tr>
<td>Majuli</td>
<td>Assam</td>
<td>Hub of neo-Vaishavite culture</td>
</tr>
<tr>
<td>Barpeta</td>
<td>Assam</td>
<td>Hub of neo-Vaishavite culture</td>
</tr>
<tr>
<td>Sivsagar</td>
<td>Assam</td>
<td>Hindu Centre of worship</td>
</tr>
<tr>
<td>Matri Mandir, Shillong</td>
<td>Meghalaya</td>
<td>Hindu Centre of worship</td>
</tr>
<tr>
<td>Tripural Sundari Temple</td>
<td>Tripura</td>
<td>Hindu Centre of worship</td>
</tr>
<tr>
<td>Baptist Church</td>
<td>Mizoram</td>
<td>Catholic Centre</td>
</tr>
<tr>
<td>Catholic Cathedral, Kohima</td>
<td>Nagaland</td>
<td>Catholic Centre</td>
</tr>
</tbody>
</table>

Adventure Tourism: The Barail and the Patkai ranges, and the eastern Himalayas offer adventure activities like rafting, trekking and mountaineering. The region has much to offer for the active adventure segment including river rafting among others, trekking of various grades and levels, rock climbing, hang gliding etc.

This can be branded as another unique selling proposition in addition to the eco-tourism theme. There is a need to harness the potential for adventure tourism across the sub-regions through adequate focus in the integrated NE Tourism Policy.

Tribal Tourism: the seven sister states are ideally placed for Tribal tourism with their rich tribal culture and distinct identities. As tribal groups are located in rural areas, many tribal tours could combine cultural tourism with outdoor exploration and hiking, or visits to national parks, wildlife sanctuaries and tiger reserves. This would showcase local cuisine, music and traditional folk dances.

3.5 Decoding Sustainability: Community Centric Approach to Tourism

Most of central government’s ministries compulsorily need to earmark at least 10% of their annual budget for expenditure in the northeast. And the unused portion of this goes into a fund called the Non-Lapsable Central Pool of Resources (NLCPR). However, on ground implementation remains a challenge. Implementation shortfall is so dire that a Planning Commission report on transport infrastructure in 2012 warned of a vicious circle of non-completion of road projects. Other than accessibility issues due to the terrain, another significant issue is the centralized approach to the issues plaguing the region.
In light of the above, there is increasing realization that development activities in the East should be pursued through a resource-led strategy within an institutional environment that has been appropriately reformed and strengthened. Institutions must be able to create and manage an environment of incentives and disincentives that encourage initiatives consistent with sound policy objectives, and discourage initiatives that channel benefits to a small group while externalizing social and environmental costs to the broader community.

There is a strong need to develop appropriate knowledge sharing and extension service mechanisms for rural communities to develop sustainable economic activities. This would include diversified agriculture and related agri industries. Community led eco-tourism has the potential to emerge as an important economic activity for sustainable development of the region.

Opportunities in Community Centric Approach to Tourism in the East:

**Bio-diversity:** The dream of the Northeast to use its biodiversity wealth sustainably and beneficially can only be realized if mobilization takes place at both regional and local levels, for example, by fully involving local communities in region wide efforts to catalog and document existing plants and their potential uses. If knowledge and awareness come together the potential benefits can be harnessed, through focus on medicinal plants and developing options for ecotourism, to the benefit of the region’s communities. There is a need to create an institutional framework in the form of an agency or authority to integrate biodiversity-related work.

**Forest Management:** The Northeastern Region boasts a vibrant tradition of community-based forest management. There is a need to strengthen incentives for communities to develop or redevelop their forest management skills, while adapting them to changing demographics, social, and economic pressures. There is also a need to change incentives so that forest departments favor community-oriented rather than centralized approaches. The importance of community involvement in forest management is critically important in the Northeastern Region, where the vast majority of upland forests are legally owned by rural villages. There are attractive opportunities in Eastern India to create management partnerships that respect the legal authority of communities and work through indigenous institutions drawing on centrally funded schemes as well as international conservation programs. In return communities will be able to develop new resource management plans that address forest conservation and livelihood issues, and gain formal tenure security for their ancestral domains. Retaining ancestral domains under communal tenure may be one of the most effective strategies for maintaining forest cover and protecting biodiversity in a manner that respects indigenous rights to natural resources and livelihood needs.

**Institutional Model:** There is a need to create an enabling institutional framework to promote Regional Eco-tourism. The concept of ‘collaborative community’ models aim to deliver sustainable socioeconomic development by building the capacity of local communities to realize the potential value of their natural and cultural heritage to create tourism enterprise opportunities through a co-operative destination management organization model, which not only supplements income, but act as an incentive (or a motivation factor) to preserve local art and culture, and maintain traditional practices like architecture, cuisine and handicrafts etc.

The creation of co-operative models encompasses all the aspects of tourism under the ambit of a unified on-ground institution, which not only controls the structure and volume of tourist activity, but also ensures that the entire destination is promoted holistically rather than by fragmented independent products or sites. It is imperative for the communities to have Direct Cash Flow in their day-to-day economy, and ensuring that the community retains the administrative aspects of the business which is critical to ensuring equitable growth.
Edge of India: Sustainable Community Tourism Enterprise Development

Community based tourism models, working on the principles of cooperation, have become key demonstrators towards promoting sustainable business models in rural India. Edge of India is a step in this direction, a joint initiative of YES BANK, India’s fourth largest private sector bank and the Scottish Government.

The first pilots are active in the States of Uttarakhand and West Bengal. The next stage envisages replication of the model across other parts of the country to create an extensive community tourism network across the country based on cooperative principles.

Unique Features of the Project

✓ This is the one of the first projects in the country trying to develop rural tourism models through co-operative Destination Management Organizations (cDMOs), based upon cooperative principles.
✓ The project gives equal emphasis to capacity building measures, while utilizing the existing infrastructure (home stays) to offer an authentic ethnic experience
✓ This is one of the few projects where the community is being imparted technical skills like developing and managing web content
✓ There is no credit/ microfinance involved in the initial stages and the project utilizes the current assets of the region to build up resources
✓ The focus is upon institutional innovation by creating a sustainable financing environment before credit can be injected into the rural economies.
YES BANK-ICC Roadmap towards Inclusive Tourism Development
4. YES BANK-ICC Roadmap towards Inclusive Tourism Development

As stated earlier in the report, most of central government’s ministries compulsorily need to earmark at least 10% of their annual budget for expenditure in the northeast. Further, for the development and promotion of North East Region, 10% of the plan allocation of the Ministry of DONER has been earmarked. An amount of Rs.98 crore had been earmarked in R.E 2013-14 for the region. As per the latest annual report of the Ministry of Tourism, the financial assistance being given to North East States includes assistance for development of tourist Infrastructure, promotion of fairs/festivals and tourism related events in the region, Information technology related projects, publicity campaigns, market development assistance, human resource development, promotion and marketing etc.

However, an integrated yet localized approach is needed to bring the region into the domestic and international tourism mind space. This would not only boost the region as a tourist destination but would have multiple socio-economic benefits attached to it:

- **Inter-State Institutional Coordination:** North East needs special treatment for tourism development rather than fitting to a singular approach.
  - **NE Tourism Development Authority:** One intervention could be to set up a NE Tourism Development Authority to manage and administer all the tourism initiatives of the seven states. This Authority would act as a nodal agency for all the tourism initiatives of all the NE states and be a single point of contact with the Ministry of DONER for various development initiatives.
  - Single point of contact with tourism authorities of neighbouring countries to develop an international circuit
  - Enhanced focus on states and regions other than Assam and unleashing the true potential of the region

- **Infrastructure Development:** Connectivity through road, railways and airways needs to be improved manifold for greater interstate and intra-state movement of people and produce. This is quintessential if the economic and social integration of the NE with the rest of the country has to be achieved. This is required to reduce travel times and better comfort. There is also a need for round the year monitoring of the quality of roads due to the prevalent climatic conditions and heavy rainfall during the monsoon period.
**International Connectivity:** transist and trans-shipment facilities including road, rail and waterways connectivity through Bangladesh to the otherwise landlocked Northeast could be a game changer for enhancing accessibility and reducing distances between Kolkata and the North-East. A number of potential international corridors have been proposed to improve connectivity of the NE with the neighboring countries- Bhutan, Bangladesh and Myanmar:

i. **Via Bhutan:** Tawang (in Arunachal Pradesh) - Jashingang Dzong (in Bhutan) - Darranga (in Assam). This will provide an alternate route between Arunachal Pradesh and Assam

ii. **Via Bangladesh:** Connecting Meghalaya with Bangladesh at Dauki, Shella, Baghmara, Burungapara and Mahendraganj and similarly Tripura at Kalkalighat, Kamalpur, Khowai, Ranir Bazar and Sabrum will develop international linkages with Bangladesh

iii. **Linking Myanmar:** International connection of Arunachal Pradesh (at Pangsu pass), Nagaland (at Lungwa), Manipur (at More) and Mizoram (at Champhai) with Myanmar will help in developing the international border trade.

**PPP:** A lot of investments are required for tourism to fully grow and have tourism infrastructure in place. Tourism being a service provider and tourism industry the big beneficiary of tourist flows, it is important for private sector to be active partners in the development process for tourism sector. Government has to act as facilitator for same and partner for some projects, in addition to initial investments in opening up sector. Some of the potential areas of PPP in tourism infrastructure include Hotels, Restaurants, Ropeways, Adventure Sports and Helicopter Services. Key success factors for success for PPP in Tourism in the North East are:

- All State Governments should consider Tourism as an industry.
- Fiscal and monetary incentives including tax holidays in the gestation period (10 to 20 years)
- Uniform incentives across the region for the private sector to plan investments accordingly.
- Creation of an integrated PPP cell under the proposed NE Tourism Development Authority to oversee the activities of appraisal, planning and monitoring on a continuous basis.
- State governments need to facilitate land to be available for PPP projects by creating an enabling environment and win-win situation for both investors and local community. This is required because people outside the NE are not allowed to acquire land in the region and very little land is currently owned by the state governments.
- Identification of heritage buildings for conversion into heritage hotels in PPP mode.

**Leveraging IT:** the extensive advantages in information technology enjoyed by the country need to be harnessed to overcome the connectivity challenges of the region. Two key interventions here could be:

- There is a need to develop an online booking system spanning the entire NE for tourism infrastructure of the region including Government and private hotels, resorts and packaged tours.
- Develop a robust tourism statistics collation system including arrivals, demographics and key tourist preferences for a feedback loop.

A robust institutional mechanism including an integrated effort coupled with a community led sustainable livelihood approach can unleash the hidden tourism potential of the North-East and Eastern India. Conversely, tourism has the potential to be the change agent for greater economic and cultural integration of the region with the rest of the country. Policymakers are increasingly aware of the strategic dimension owning to its location of the NE region and therefore the focus on the region has increased manifold compared to anytime in its post independence history. Tourism also holds great potential to lift the economies of relatively under developed Eastern states. It would require the collaborative efforts of all stakeholders to realize the vision of a prosperous and dynamic East and North Eastern India.
YES BANK, India’s fourth largest private sector Bank, is the outcome of the professional & entrepreneurial commitment, vision & strategy of its Founder Rana Kapoor and his top management team, to establish a high quality, customer centric, service driven, private Indian Bank catering to the Future Businesses of India.

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 a superior customer experience for its retail, corporate and emerging corporate banking clients. YES BANK is steadily evolving its organizational character as the Professionals’ Bank of India with the uncompromising Vision of “Building the Best Quality Bank of the World in India by 2020”.

Founded in 1925, Indian Chamber of Commerce (ICC) is the leading and only National Chamber of Commerce operating from Kolkata, and one of the most pro-active and forward-looking Chambers in the country today. Its membership spans some of the most prominent and major industrial groups in India. ICC is the founder member of FICCI, the apex body of business and industry in India. ICC’s forte is its ability to anticipate the needs of the future, respond to challenges, and prepare the stakeholders in the economy to benefit from these changes and opportunities. Set up by a group of pioneering industrialists led by Mr G D Birla, the Indian Chamber of Commerce was closely associated with the Indian Freedom Movement, as the first organised voice of indigenous Indian Industry. Several of the distinguished industry leaders in India, such as Mr B M Birla, Sir Ardeshir Dalal, Sir Badridas Goenka, Mr S P Jain, Lala Karam Chand Thapar, Mr Russi Mody, Mr Ashok Jain, Mr Sanjiv Goenka, have led the ICC as its President. Currently, Mr. Roopen Roy is leading the Chamber as it’s President.

ICC is the only Chamber from India to win the first prize in World Chambers Competition in Quebec, Canada.

ICC’s North-East Initiative has gained a new momentum and dynamism over the last few years, and the Chamber has been hugely successful in spreading awareness about the great economic potential of the North-East at national and international levels. Trade & Investment shows on North-East in countries like Singapore, Thailand and Vietnam have created new vistas of economic co-operation between the North-East of India and South-East Asia. ICC has a special focus upon India’s trade & commerce relations with South & South-East Asian nations, in sync with India’s ‘Look East’ Policy, and has played a key role in building synergies between India and her Asian neighbours like Singapore, Indonesia, Bangladesh, and Bhutan through Trade & Business Delegation Exchanges, and large Investment Summits.

ICC also has a very strong focus upon Economic Research & Policy issues - it regularly undertakes Macro-economic Surveys/Studies, prepares State Investment Climate Reports and Sector Reports, provides necessary Policy Inputs & Budget Recommendations to Governments at State & Central levels.

The Indian Chamber of Commerce headquartered in Kolkata, over the last few years has truly emerged as a national Chamber of repute, with full-fledged offices in New Delhi, Guwahati, Patna and Bhubaneswar functioning efficiently, and building meaningful synergies among Industry and Government by addressing strategic issues of national significance.