

Emerging Northeast Growth strategies for Development

February 2023


Knowledge Partner








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 सत्यमेव जयते

 आज़ादी का
अमृत महोत्सव

B. L. VERMA
Minister of State
Cooperation and
Development of North Eastern Region
Government of India



संदेश

मुझे यह जानकर प्रसन्नता है कि एसोचैम गुवाहाटी में 7 और 8 फरवरी को "इमर्जिंग नॉर्थ ईस्ट" के छठे एडिशन का आयोजन कर रहा है।

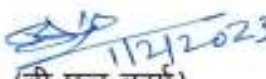
पूर्वोत्तर भारत आसियान देशों के लिए हमारा प्रवेश द्वार है और यह भारत की एक्ट ईस्ट नीति में एक केंद्रीय भूमिका निभाता है। इस क्षेत्र में व्यापार और निवेश के लिए अत्यधिक क्षमता है। इसके प्राकृतिक संसाधनों, मानव पूंजी और व्यावसायिक अवसरों के संदर्भ में क्षेत्र की संयुक्त शक्ति इस क्षेत्र को एक आकर्षक निवेश स्थल बनाती है। हाल के वर्षों में उत्तर पूर्वी क्षेत्र विकास मंत्रालय ने राज्यों और अन्य प्रमुख हितधारकों के साथ मिलकर इस क्षेत्र की क्षमता बढ़ाने और इस क्षेत्र में अवसररचना और कनेक्टिविटी को सुधारने के लिए परियोजनाओं की श्रृंखला शुरू की है।

मैं, पूर्वोत्तर क्षेत्र और इसकी व्यावसायिक क्षमता को उजागर करने के लिए एसोचैम के प्रयासों की सराहना करता हूं। यह सराहनीय है कि इस दो-दिवसीय व्यवसाय बैठक में अग्रणी क्षेत्रों और उद्यमिता के अवसरों को उजागर किया जाएगा। एसोचैम की अध्ययन रिपोर्ट से उद्योग के सदस्यों को मदद मिलेगी।


मैं इस कार्यक्रम की सफलता की कामना करता हूं।

जय हिंद

नई दिल्ली
01 फरवरी 2023


 11/2/2023
 (बी.एल.वर्मा)

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Foreword



Mr. Mahendra Kumar Agarwal

Chairman,
Northeast Regional Council,
ASSOCHAM

In today's scenario, the North-eastern Region, comprising of eight states with Assam being the key state for development, acts as a potential hub for our trade relation with ASEAN. It plays a major role as the entire North-eastern States on the territorial frontier of India's Eastward engagement, leading to the long-term growth of North East.

The Northeast region possesses tremendous economic growth potential to position India as a regional and global power. The champion sectors of Northeast, starting with Tourism, Infrastructure, Logistics (including Mini Shipping), Agro and Food Processing, Pharmaceuticals and Medical Devices, Biotechnology, Handicraft and Handloom, Construction, New and Renewable Energy and many more plays a pivotal role towards economic importance and development of the entire industrial ecosystem of North East.

The region, due to its geographical advantage is strategically well located and holds significant importance in terms of strategic, cultural, economic and ecological aspects, thus leading to development of trade and commerce with overseas countries, particularly with Southeast Asian Countries such as Bangladesh, Bhutan, Nepal and ASEAN countries. Besides, it plays a vital role in improving the socio-economic condition of the States of Northeast.

The Government of India has undertaken various strategies, policy interventions, initiatives like Gati Shakti, infrastructure developments for economic development of North-eastern region. There is huge investments being made in key sectors like Tourism, infrastructure, logistics, food processing, etc and states are taking enough efforts towards making this region a preferred investment destination.

At ASSOCHAM we believe the comprehensive implementation of Act East Policy, with capacity building of local entrepreneurship, setting up of Centres of Excellence for educational development, sports and other key sectors would further build the region make NE a preferred destination for domestic and international businesses.

ASSOCHAM believes a connected business and government effort shall help build a strong Bharat where NE is important and lead partner of it.

The ENE program is an opportunity for business and government to join hands together to build a road map that shall help build business eco system.



Foreword



Mrs. Perminder Jeet Kaur

Senior Director
East and Northeast,
ASSOCHAM

Northeast of India is witnessing significant infrastructural growth from building airports to railways to large network of roads, the region is witnessing a fast-paced growth. The North-eastern Region has abundant water resources. One-third of India's surplus water flows from the Northeast through the Brahmaputra and Barak rivers. Water is key future resource of this planet, and this is an untapped opportunity for the region to grow exponentially.

The region, due to its well laid geographical location, rich natural resources followed by a bouquet of biodiversity and unique traditions, is a "Natural Economic Zone". The existing and present infrastructural developments, particularly in a state like Assam, has made this region an ideal platform for further development and growth of business and be essential part of Global Value Chain. Focus on enhancing productivity, building capacity of entrepreneurs, raising awareness among business on ESG and other global agenda should also go hand in hand.

Champion sectors of the region energy, mobility, agro and food processing, healthcare offer huge investment benefits for industry and with growing infrastructural development supported by skilled manpower, the region is all set to be a vibrant economic hub. There is a need for an integrated approach, greater cooperation at regional and local levels. This involves further developing a shared vision of costs and benefits through strategic planning and infrastructure interventions to improve the economy of the region.

Playing to the regional strength, industry and government partnership can scale up development of the region while maintaining the right balance and mitigating the threats that have existed traditionally. Adopting learnings from small countries of Europe and Asia that have significantly lifted up their economy with limited resource while protecting the flora and fauna, shall take the regional economy to higher level.

ASSOCHAM is committed to work with industry and governmental agencies to voice the opinions of business and handhold entrepreneurs. Emerging Northeast is one such initiative and we look forward to greater cooperation of all stakeholders.

Thank you.



Foreword



**Mr. Adarsh
Sharma**

Managing Director,
Primus Partners

The territory of the eight sisters (Ashta Lakshmis), the north-east, is a tranquil, timeless image of green hills, with a predominating culture. The area has enormous potential that, if used wisely, could put North-East India on the national and international map.

This report, **Emerging Northeast: Growth Strategies for Development**, was created in collaboration with the ASSOCHAM and Primus Partners Limited to highlight the potential opportunities. North-eastern area has the potential to grow into a self-sufficient economic unit of the nation and can help create a better and newer India.

The report offers a thorough examination of the situation as it is right now and the potential for trade and exports –where the region has a competitive edge. It offers suggestions that could encourage decision-makers and government representatives to strive for balanced regional development. Additionally, we have pointed out areas for development and offered suggestions that could close the gap. The report highlights growth enablers, such as infrastructure, education and skill development, environment, and policy initiatives, which need to be worked on in the interest of progress. Additionally, the initiatives that began to take shape in the preceding years, such as the BBIN initiatives, Look East policy, and Smart City initiatives have also been discussed.

We, at Primus Partners, are extremely pleased to work with ASSOCHAM on this knowledge paper, which we plan to release at the **Emerging Northeast India Summit** being held in Guwahati, Assam. The report has been prepared based on inferences drawn basis public data by Primus Partners, with a focus on the potential and necessary enablers in the North-East. The objective is to present a comprehensive study that policy makers and investors can utilise to create action plans that can spur regional prosperity.



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01 | Northeast Region Profile





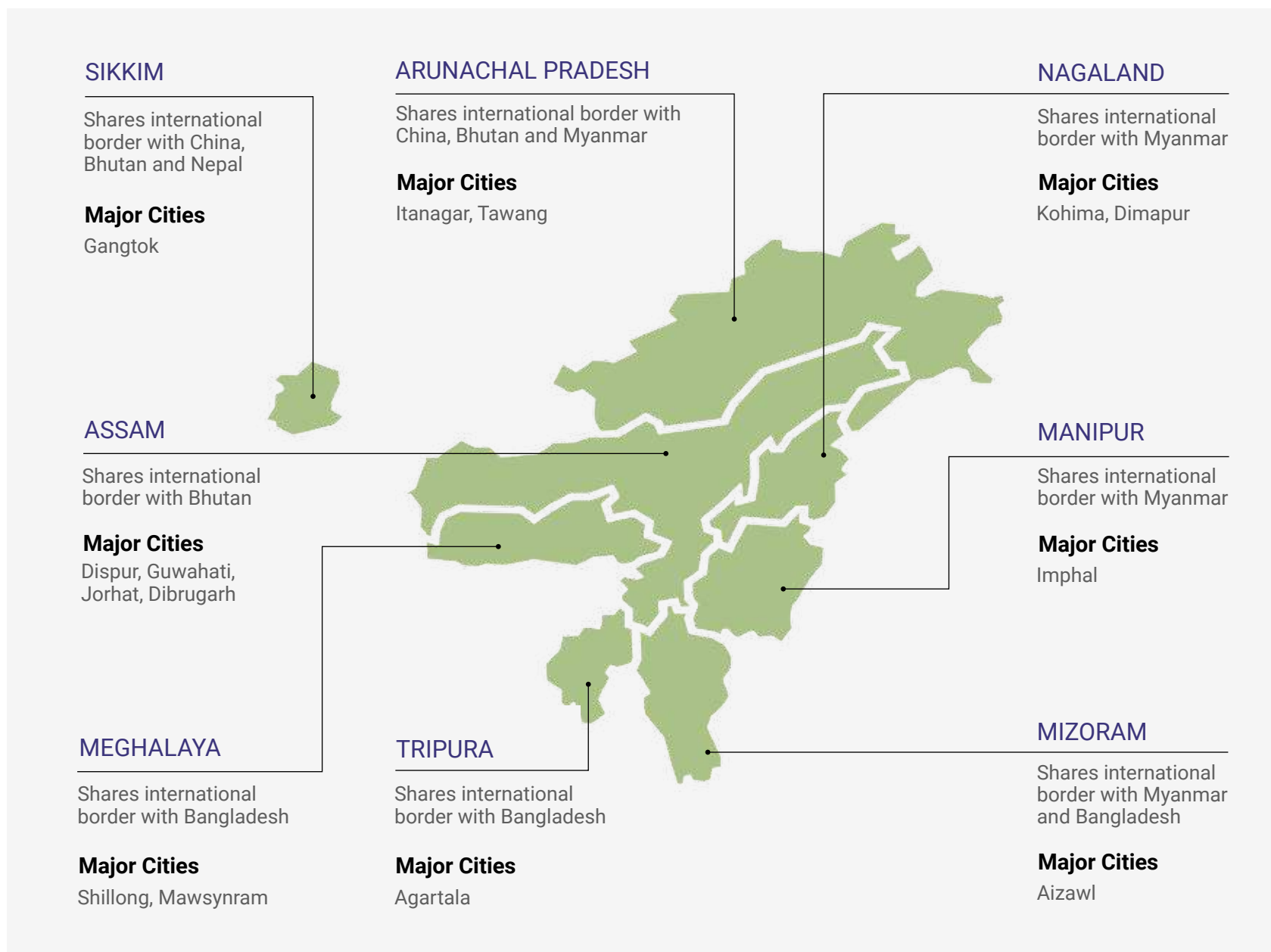
1.1 Northeast Economic Development Scenario

Introduction

Northeast India refers to the **eight states located amid the East Himalayan region in the north-eastern part of India**, and consist of *Arunachal Pradesh, Assam, Manipur, Meghalaya, Mizoram, Nagaland, Sikkim, and Tripura*. The region shares international boundary with countries such as Nepal, Bhutan, China (Tibet), Myanmar, and Bangladesh.

As per the 2011 census, **around 3.8% of the country's population resides in the NER region**, comprising almost 8% of the country's area including 5,483 Km of India's international borders. The Northeast region (NER) has relatively high literacy rates and human development levels as compared to the rest of the country. The region is also blessed with natural resources and ideal climatic conditions for Agriculture, Plantations and Sericulture and holds immense potential for tourism, exports and enhanced scope for regional cooperation.

Figure 1: Map of Northeast States, with bordering countries and major cities





The region's complicated terrain and history of insurgencies had previously made it difficult for economic activities to pick up and the population to remain dependent mainly on agricultural activities. However, the region has been peaceful for close to two decades and initiated several positive measures for the development of the North-eastern states.

The North-eastern states have always been heavily dependent on the central government for funds. In recent years, however, the central government and the north-eastern states have taken several steps for the promotion of industry, development of infrastructure, and the tourism sector in their respective states. From the establishment of the *Department of Development of North-eastern Region (DoNER)* in 2001 to coordinate the developmental efforts in the northeast region to more recent initiatives that include the *Northeast Special Infrastructure Development Scheme (NESIDS)* for infrastructure projects, improvements in water and power supply, development of tourism infrastructure, and improving railways connectivity from the north-eastern region to other parts of the country.

The recent developments in the region shall help it reduce its dependence on the central government for funds, enhance connectivity, bring basic infrastructure to a majority of households, serve as a major booster to tourism, improve the ease of doing business in the region and help to unlock new economic opportunities for the people in the state.

In the **Niti Aayog National Innovation Index 2021 Rankings**, Manipur emerged as the leading performer in the Northeast and Hill States category due to its high R&D expenditure as a percentage of GSDP and putting in concerted efforts to foster innovation in the state with an increasing percentage of schools with ICT labs. Manipur also scored a high score in knowledge workers and safety and legal environment pillars. ¹

¹ [India Innovation Index 2021](https://www.niti.gov.in/), Niti.gov

NE and Hill States Innovation Index 2021 Rankings		
States	Rank	Score
Manipur	1	19.37
Uttarakhand	2	17.67
Meghalaya	3	16
Arunachal Pradesh	4	15.46
Himachal Pradesh	5	14.62
Sikkim	6	13.85
Mizoram	7	13.41
Tripura	8	11.43
Assam	9	11.29
Nagaland	10	11

Figure 2: Niti Aayog National Innovation Index 2021



Further, in its efforts to improve engagement of the Northeast region with the greater Indo Pacific and Southeast Asian region, the central government introduced the **Act East Policy in 2014**, a continuation yet updated version of the Look East policy previously launched in 1991. Both policies are similar in their objectives and reflect India's evolving foreign policy. While the Look East policy focussed on economic cooperation with the East and Southeast Asian countries, the Act East policy also has a security dimension to it and aims to **promote economic, strategic and cultural relations with the vast Asia-Pacific region** at different levels, showing India's growth in economic strength and stature over the years.

Northeast India is positioned to serve the Government of India's strategic vision encompassed in the Act East Policy. The region has **abundant deposits of oil, natural gas, coal, and limestone**, and a sizable proportion of land under cultivation for **agro-horticulture products, bamboo, and rubber**. The region also acts as a land bridge for India's participation in institutional forums, including the **Bay of Bengal Initiative for Multisectoral Technical and Economic Cooperation** and the **South Asia Subregional Economic Cooperation (SASEC)** program.

Further, access to Myanmar offers great potential to integrate India with other Association of Southeast Asian Nations (ASEAN) countries.



Under the Act East Policy, several projects, funded by the Ministry of External Affairs, have been undertaken to connect North-eastern states with neighbouring countries like Myanmar & Bangladesh. This includes the **development of an economic corridor**.



The government is also implementing infrastructure **projects on National Waterways** in the North-eastern Region (NER). This includes developing Inland Water Transport (IWT) projects on National Waterway-2 (River Brahmaputra) from Dhubri to Sadiya, including the upgradation of terminals at ports.

Among the countries with which it shares a border, the **majority of Northeast India's trade is with Bangladesh**, while its trade with other neighbouring countries such as Bhutan and Myanmar mostly occur through border points located outside of the region.



Emerging Startup Ecosystem

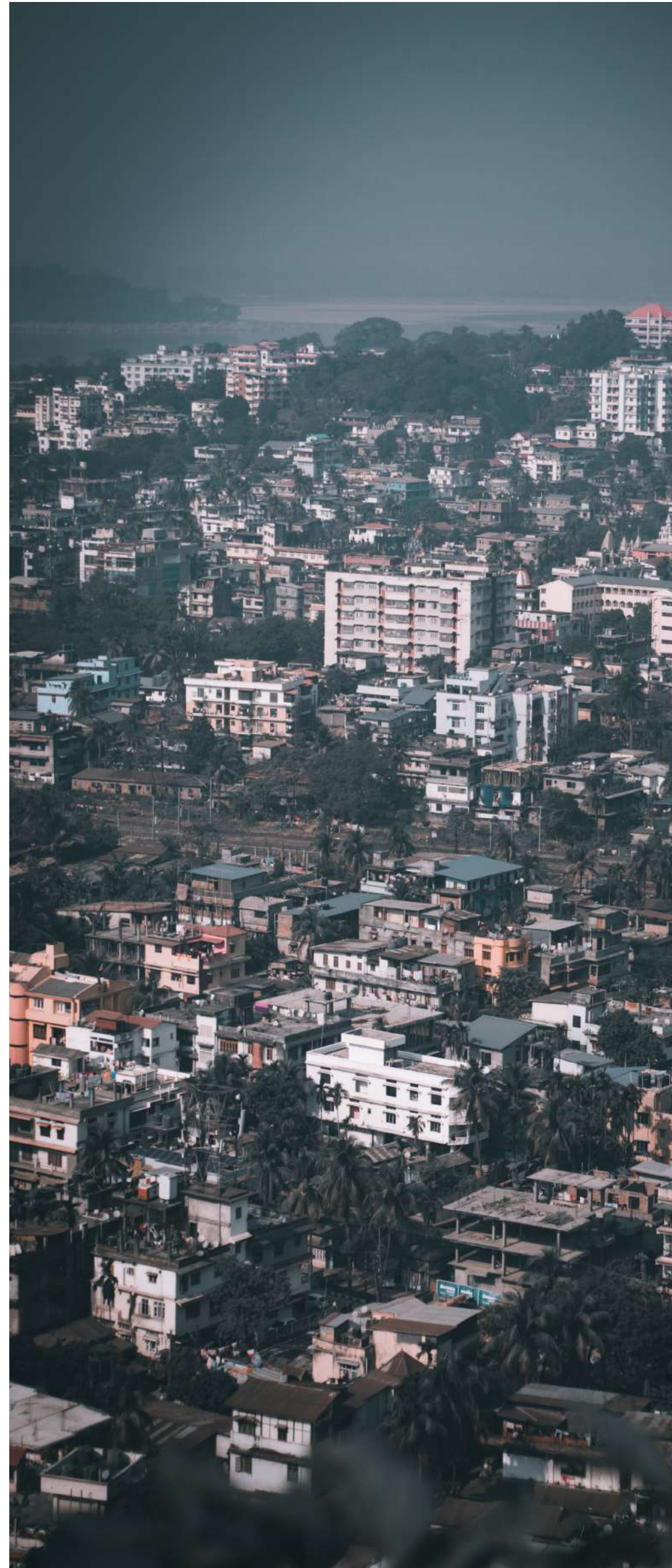
The start-up ecosystem in the Northeast has shown tremendous progress over the past decade as advances in technology and implementation of massive infrastructure and connectivity projects has provided the population with the opportunity to begin and sustain start-ups that previously have been unviable.

The Department for Promotion of Industry and Internal Trade (DPIIT) has recognized **674 start-ups in the North-eastern Region (NER) with Assam having the highest number of start-ups at 499** as of 31 January 2022. ²

Start-ups in other states in the NER include **Arunachal Pradesh (8), Manipur (68), Meghalaya (17), Mizoram (6), Nagaland (21), Sikkim (8), and Tripura (47).**

In 2021, various start-ups, from adventure tourism and agri-tech to media & entertainment, witnessed a rise in their businesses.

In the **National Start-up Rankings of States 2021, Meghalaya stood as the leader among UTs and North-eastern (NE) States** while Mizoram and Ladakh were listed as Emerging Start-up ecosystems. ³



² [Start-Ups in North-Eastern States](#), PIB, 2 February 2022

³ [Results of Start-Up Ranking of States 2021 announced](#), PIB, 4 July 2022



Agriculture

Agriculture remains the primary employer in the Northeast Region (NER) with the majority of rural households in the region still dependent on Agriculture as their principal means of livelihood.

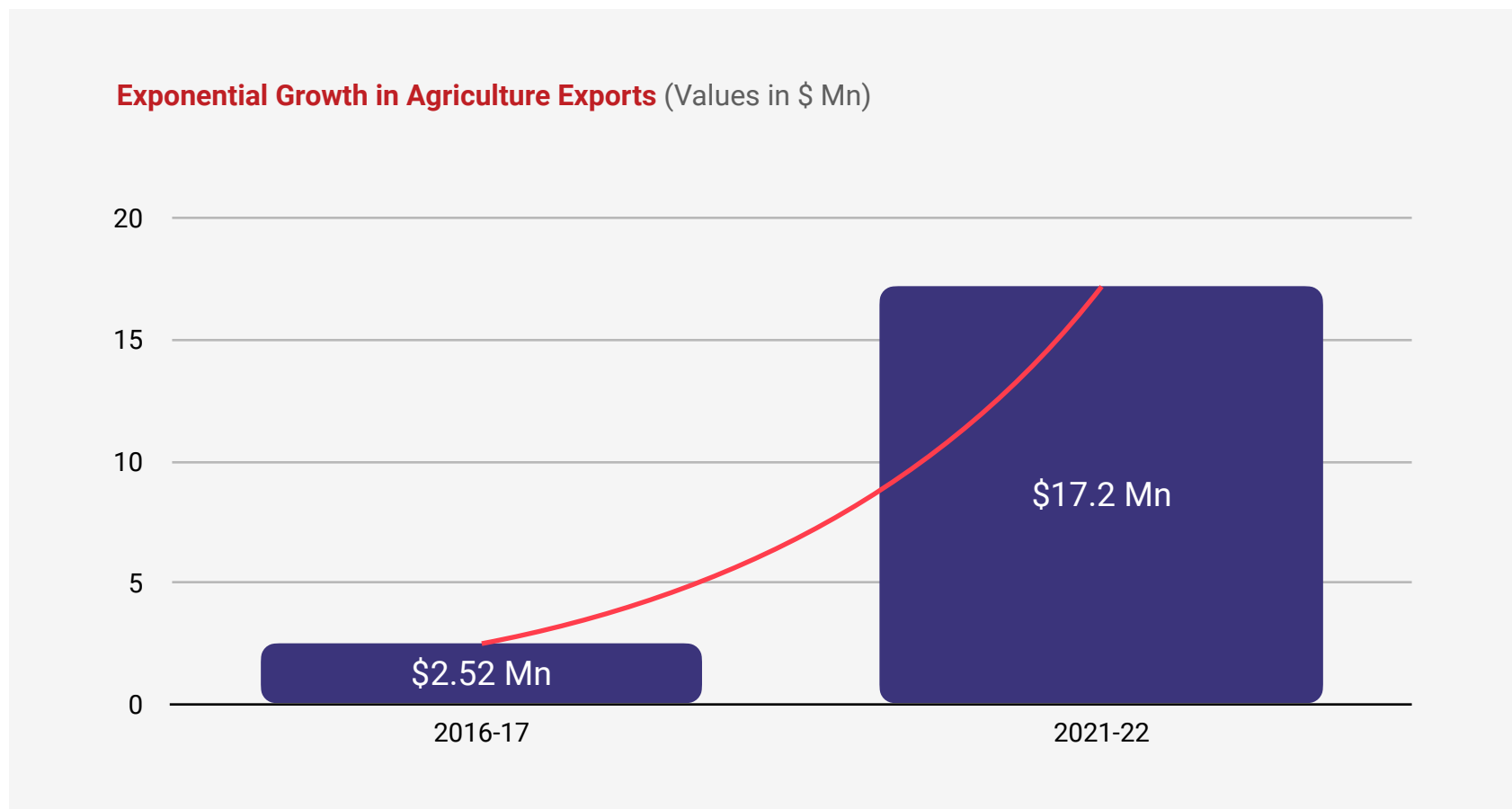
The region's climatic conditions along with its natural resources have made it an ideal destination for activities such as Plantations and Sericulture.

India's northeast region has witnessed **more than 85% growth** in the export of agricultural products over the last six years. ⁴

Agricultural exports reached \$17.2 million in 2021-22 from \$2.52 million in 2016-17.

Assam had the biggest share of export in Agricultural and allied products among the eight Northeast states with exports of over Rs 1,700 crore, that is equivalent to **99% of the NE's total export value** of Agricultural products. ⁵

Figure 3: Value of Agriculture Exports of the Northeast region



² [Northeast India sees over 85% agricultural product export growth in last 6 years](#), Livemint, 2nd December 2022

³ [Northeast exported goods worth Rs 1,800 crore in last fiscal](#), Union agriculture minister Narendra Singh Tomar, The Times of India, 3 August 2022



1.2 ASSAM - India's Expressway to South East Asia



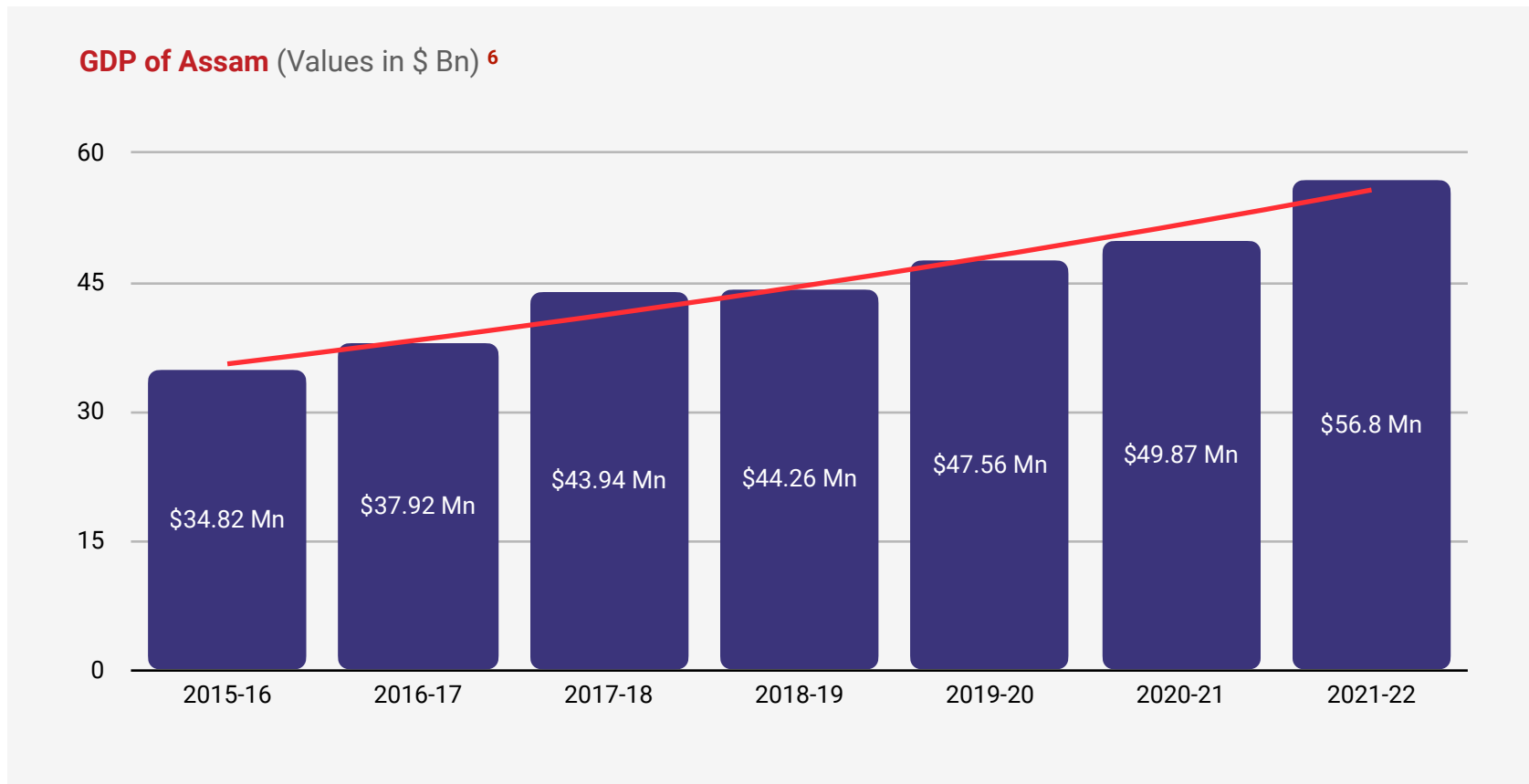
In recent years, the Assam government has been working to position the state as **the expressway to ASEAN and Southeast Asia** through all all-round development of the state in an inclusive and planned manner following the Centre's renewed emphasis on the Act East policy, introduced in 2014.

Assam is often called the **gateway to the Northeast** and shares its borders with several north-eastern states and international borders with countries such

as *Bangladesh, Myanmar, and the Kingdom of Bhutan*. The state is also the largest in the Northeast region (NER) both in terms of geographic spread and the size of the economy. **Given Assam's strategic location, it is well-suited to act as a trade hub between the North-eastern states and its international neighbours**, helping to boost domestic exports by focussing on developing appropriate manufacturing capabilities, human resources, and infrastructure including logistics.



Figure 4: GDP of Assam at Current Prices (in US \$ Bn) ⁶

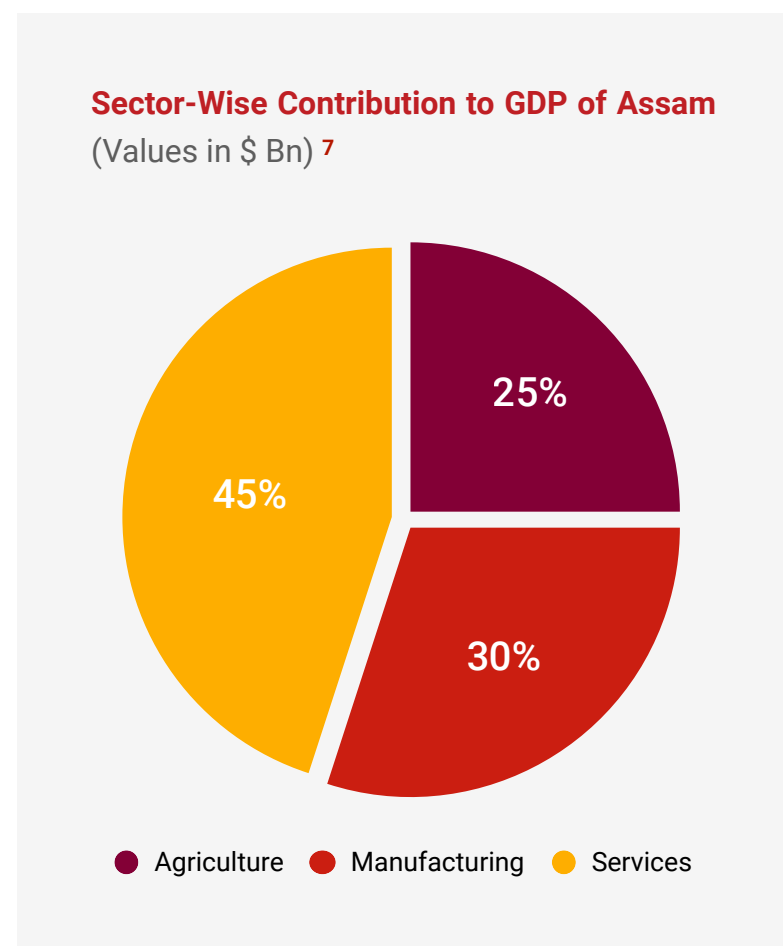


As the Northeast region (NER) acts as a transit zone for India’s land-based exports to these regions. As **Assam is the most industrialized state in the region**, it can create a space for itself in India’s export profile by tapping into specific commodities demanded by ASEAN and BBN and moving up the value chain of resource-based industries that it has a natural advantage in.

To capitalize on its natural advantages, **the state government should work to boost industrial and infrastructural growth** in the state on a war footing. To ease the business atmosphere in the state, the government has adopted several investor-friendly policies to attract investments and accelerate industrial development, which include the *Industrial and Investment Policy, 2019*, *Tourism Policy 2022*, *Logistics and Warehousing Policy 2022*, among others.

Inadequate infrastructure has frequently been listed among the key reasons by investors for the lack of investments in the region. In recent years, the central and state governments have worked to rectify this, and Assam has seen significant infrastructure development. The government has taken several steps to improve transportation, power, and communication infrastructure in the state.

Figure 5: Sectoral Contribution to Assam GDP in 2021-22 (at Current Prices)



⁶ Assam, IBEF, September 2022

⁷ Assam Budget Analysis 2022-23, PRS Legislative Research



Education



The state government has been working to improve the social infrastructure in the state, with the **construction of new schools, colleges, and hospitals.**

- As per the Assam government, more than **4,000 government schools in the state will receive an infrastructure boost** over the next five years with the government spending **5,000 crore** for the initiative.⁸ Further, the infra-structure of sainik schools in the state will also receive an upgrade.
- The government has also been working to set up the **Assam Skill University**, a multidisciplinary skill training institute **at a cost of 1,000 crore**, which will be the first-of-its-kind in the entire eastern part of the country and will provide skill education to the youth of India with a specific focus on Assam, and North-eastern region.⁹

Waterways



Assam has been gifted with **ample water resources** and has the natural advantage of an intricate inland waterways network, which could be developed and integrated with other modes of transport to allow for efficient movement of goods.

- **Out of the 111 declared national waterways, 15 pass through Assam**, including NW-2 of the Brahmaputra river.¹¹
- The state government has taken **steps to improve connectivity through waterways** by developing the entire area between Sadiya and Dhubri along the Brahmaputra river for better connectivity. The state government is also developing a multimodal hub on the Brahmaputra in Guwahati. This would include a **ship repairing port at Pandu, four tourist jetties** as well as **11 floating terminals.**¹²

Oil and Gas



Assam is also the **largest producer of onshore natural gas in India** and the state is being developed as a hub for the oil and natural gas industry, with several private sector investments being made in the sector.

- To attract investments into the Oil and gas sector in the state, the government announced the **setting up of an investment holding company to pump in money into oil, gas and fertilizer entities** and manage those stakes, thus adding to revenue stream of the government.¹⁰

⁸ [Assam govt to boost infrastructure in 4000 schools in next 5 years: CM Himanta Biswa Sarma](#)
Economic Times, 31 October 2022

⁹ [Assam CM attends Bhumi Pujan for upcoming Assam Skill University in Mangaldai](#)
The Print, 6 November 2022

¹⁰ [Assam govt to set up investment holding firm for oil & gas sector](#)
Economic Times, 25 December 2021

¹¹ [Assam](#), Invest India

¹² [Air, rail, road connectivity boost in Northeast! Centre executing projects worth Rs 1,34,200 crore, says FM](#)
Financial Express, 1 June 2022



Power

The state government has been hard at work to improve the power infrastructure in the state through a focus on **improving the existing electricity transmission in the state and more renewables.**

- To improve electricity transmission in the state, the state government signed a **\$304 million loan agreement for the Assam Intra-State Transmission System Enhancement Project** to improve reliability, capacity and security of the power transmission network in the North-eastern state and strengthen Assam's electricity transmission system. ¹³
- The cabinet also approved the implementation of a **Revamped Distribution Sector Scheme (RDSS) in Assam with an investment outlay of Rs 8,727.08 crore**, which included the construction of a high-voltage distribution system, new sub stations and lines, among others. Further, the government also provided 137 crore as tariff subsidy to the Assam Power Distribution Company Ltd (APDCL). ¹⁴
- The government has been **promoting renewable energy sources such as solar and hydroelectric power**, and several private sector investment has been made in these sectors with Assam currently having a share of around 32% of renewables in Energy.



Tea

Assam is **responsible for more than half of India's tea production** and its share in in India's export of tea to various countries in the world is more than 50%. ¹⁵

- In FY22, tea exports from Assam accounted for **40% of the total exports from the state**, totalling US\$ 179.65 million.
- To further boost tea production and exports out of the state, the government has been working on a draft tea policy that proposes providing **financial aid for opening tea boutiques at major tourist centres in Assam**, among other initiatives to increase the per capita consumption of tea in the state. ¹⁶

¹³ [India, AIB sign agreement to improve Assam power transmission](#), Economic Times, 24 February 2021

¹⁴ [Assam govt to set up investment holding firm for oil & gas sector](#), Economic Times, 25 December 2021

¹⁵ [Exportable items and border infrastructure](#), Government of Assam Industries and Commerce

¹⁶ [New policy plans to bring Assam tea to boutiques in metro cities, state's tourist centres](#), Deccan Herald, 20 October 2022

02

Infrastructure
inefficiency
impedes growth



3.1 Global Scenario

Infrastructure forms the foundation for a country's development. The building of modern infrastructure is a necessity for any country that wants to sustain high economic growth and transition into a developed state. Infrastructure plays a significant part in the economic growth of any country by increasing productivity and providing services that enhance the quality of life.

Infrastructure is also a **key element of poverty alleviation** as the majority of poor in the world suffer due to the unavailability of basic public infrastructure such as roads, water, health and educational institutes. Inadequate physical infrastructure such as poor road access leads to high cost of transportation; reducing ability to use access high quality input and other social infrastructure. Therefore, the development of even basic road infrastructure acts as a clear means by which large numbers of people might acquire the opportunity to participate in the market economy and raise themselves out of poverty.



3.2 Infrastructure in India

While India has built formidable digital and financial infrastructure that rivals the best in the world, India, and **especially Northeast India has suffered due to insufficient physical infrastructure** that has been listed as the primary reason by investors for the lack of investments in the North-eastern region of the country.

While India has increased its focus on building infrastructure in the past decade, it still lags behind the majority of the developed world in infrastructure development due to several roadblocks. Recognizing the importance of infrastructure for the socio-economic development of the country, the government has undertaken several measures to accelerate the pace of overall infrastructure development.

The government increased the **Budgetary allocation towards capital expenditure** from 5.54 lakh crore in 2021-22 to **Rs. 7.50 lakh crore in 2022-23**, with a significant amount going to building infrastructure in roads and railways. ¹⁷

Initiatives such as the **National Infrastructure Pipeline, Bharatmala** and **Sagarmala**, along with the **Gati Shakti Master plan** are likely to hasten the pace of infrastructure development in the country.

¹⁷ [Sharp Increase of 35.4% in Capital Expenditure](#)
PIB, 1 February 2022



Infrastructure in the Northeast

The North-eastern Region (NER) has traditionally suffered due to **inadequate infrastructure that has acted as a big hindrance** to businesses and investments and hindered the productivity of the population. For years, infrastructural development in the Northeast progressed at a snail's pace despite the regions potential to become a global economic powerhouse and steer India's growth.

The government's emphasis on infrastructure development has come as a great boon for the region and will help to unlock its economic potential. Several connectivity projects currently under implementation by the government are geared towards connecting remote areas of the region, enhancing economic opportunities for the local population, and reducing logistics costs for businesses.

The government's **Act East policy**, coupled with its nationwide emphasis on infrastructure development has put the Northeast region on an **infrastructural expansionist fast track** with a massive increase in the network of roads and highways, expansion of air connectivity, an extension of railway networks, opening trade routes, as well as creating infrastructural conditions for border trade. As the NER is surrounded by international borders, both local as well as international border infrastructure development can help the NER to become more economically engaged with the neighbouring countries.

Further, within the Northeast Region (NER), there exist **considerable inter-state variations in the availability of infrastructural facilities**. Currently, states such as Assam have comparatively better physical and social infrastructure than Nagaland or Arunachal Pradesh. As infrastructure development is intimately related to economic progress, the enhanced focus on infrastructure in the NER is much welcomed to bring it on par with the rest of the country.





Urban Infrastructure



The North-eastern region (NER) has **nine cities that have been declared as 'Smart Cities'**. These include Agartala, Guwahati, Imphal, Kohima, Namchi, Gangtok, Pasighat, Itanagar and Aizawl. **A fund of Rs 14,124 crore for 464 projects has been sanctioned** in the first phase as part of the Smart City Mission in the North-eastern region.

The North-eastern states of **Sikkim, Nagaland and Tripura have made full use of the funds allocated** to them as part of the smart cities mission. All three have **utilised more than 90 per cent of the funds** allocated to them during the period. ¹⁸

- **Sikkim** has utilised 99.90 per cent of the GOI share of Rs. 537 Crores.
- **Nagaland** has managed to utilise 97.84 percent of the total GOI share of Rs 196 crore released till January.
- **Tripura** has utilized 94.80 per cent of 250 crore allocated under the Smart Cities Mission till January 21, 2022.

As per the report, **out of the total Rs 196 crore released** by the Central Government as part of the Smart Cities Mission, **Assam could only utilise Rs 74.25 crores** of the total amount. ¹⁹

¹⁸ [Fund of Rs 14,124 crore approved for 464 projects in 8 Smart Cities in Northeast](#)
Indian Express, 27 October 2017

¹⁹ [Smart City Mission in Northeast: Utilisation of fund is the lowest in Assam](#)
Nezine Bureau, 26 April 2022



Roads ²⁰

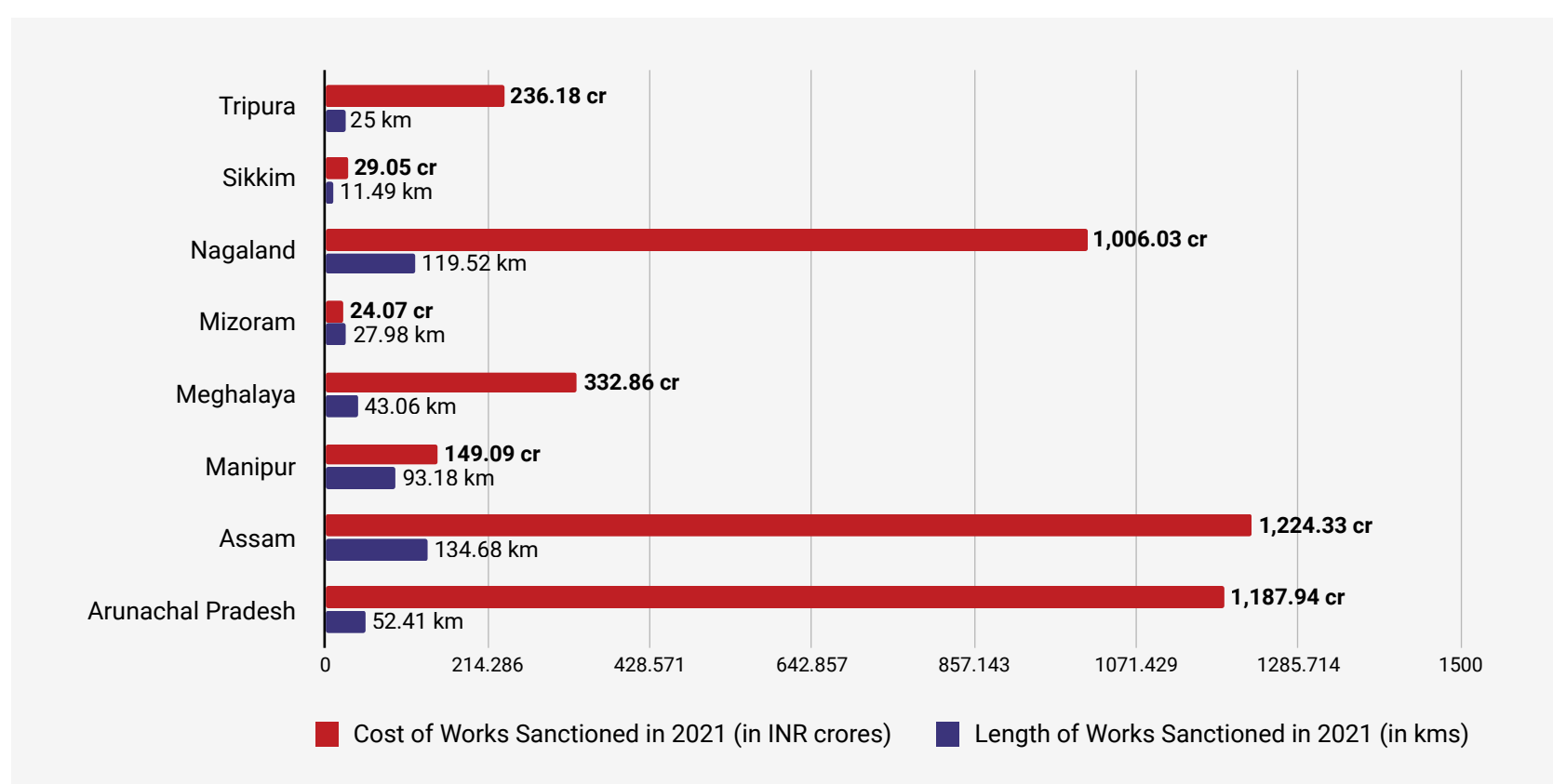


- As of February 2022, **projects worth Rs.58,385 crore, covering a total of 4016.22 km** were ongoing in the NER, the majority of which were undertaken in the past five years.
- As per the government, the **completed projects in the NER cover a length of 3099.50 km at a cost of Rs.15,570.44 crore.**

Figure 6: Ongoing Road Projects in the Northeast (February 2022)

No.	States	Number of Projects	Length (In km)	Cost (In INR crore)
1	Arunachal Pradesh	34	749.42	8973.11
2	Assam	29	418.53	10527.12
3	Manipur	33	628.2	7833.592
4	Meghalaya	18	237.46	3193.41
5	Mizoram	23	599.87	10616.58
6	Nagaland	39	803.55	9205.96
7	Sikkim	17	197.44	3963.918
8	Tripura	20	382.02	4071.31
	Total	213	4016.48	58,385

Figure 7: Works Sanctioned by Ministry of Road Transport and Highways in the North Eastern Region in 2021



²⁰ Infrastructure Development in North Eastern States, PIB, 10 February 2022



Power ²¹



Power connectivity has been a major issue in the North-eastern part of the country. However, the past few years have seen significant efforts being made to improve the power infrastructure in the region.

- Flagship schemes such as **Deendayal Upadhyaya Gram Jyoti Yojana (DDUGJY)** and **Integrated Power Development Scheme (IPDS)** are under implementation for strengthening of transmission and distribution infrastructure.
- **NER specific schemes such as North-eastern Region Power System Improvement Project (NERPSIP)** for six States (Assam, Manipur, Meghalaya, Mizoram, Tripura and Nagaland) are aimed at **strengthening of the Intra-State Transmission and Distribution System (33kV and above)**.
- Further, **initiatives such as the Comprehensive Scheme for Strengthening of Transmission & Distribution Systems** in Arunachal Pradesh and Sikkim is playing a major part in improving power connectivity in the NER.

Telecom



- As per the government, it is working hard **to ensure all inhabited villages in the North-eastern region and border areas are connected with 4G network** by December 2023. ²²
- In the past five years, around **Rs. 633.88 crore has been disbursed by the government on provision of mobile services in uncovered villages** in Assam, Manipur, Mizoram, Nagaland, Tripura, Sikkim, and Arunachal Pradesh (National Highways only) of NER. ²³

Air Connectivity ²⁴



- Between 2016-17 to 2021-22, around **28 projects worth Rs. 979.07 crore have been completed** in the region. As of February 2022, around **15 projects worth Rs 2,212.30 were under implementation**, likely to be completed by March 2023.

²¹ [Infrastructure Development in North Eastern States, PIB, 10 February 2022](#)

²² [Every Village In Northeast India To Have 4G Network By Dec 2023: Centre, NDTV, 8 November 2022](#)

²³ [Infrastructure Development in North Eastern States, PIB, 10 February 2022](#)

²⁴ [Infrastructure Development in North Eastern States, PIB, 10 February 2022](#)



Railways ²⁵

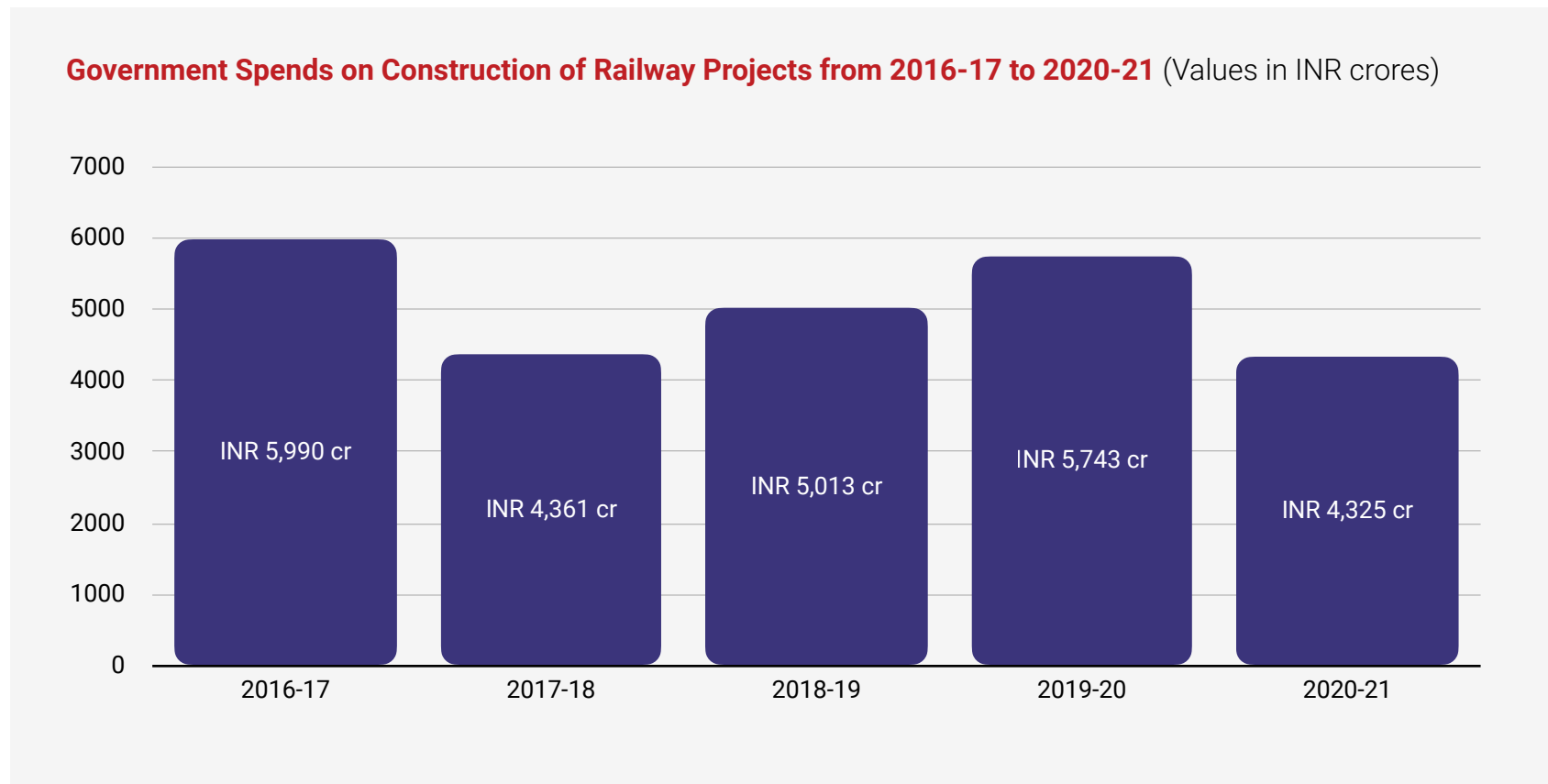


The central government has put a **special emphasis on the development of railways in the North-eastern region** in an effort to better connect the region with the rest of the country.

- **As of 1 April 2021, 20 projects worth Rs.74,485 crore for 2,011 km length** falling in the North Eastern Region were under different stages of planning/ approval/ execution. As of March 2021, 321 km length has been commissioned and an expenditure of Rs.26,874 crore incurred, spread across the northeast region.



Figure 8: Expenditure on the construction of railway projects of New Lines and Doubling in NER over the years



²⁵ Infrastructure Development in North Eastern States, PIB, 10 February 2022



EXPERT VIEW



Mr. Sandeep Khaitan

Vice Chairman
ASSOCHAM Northeast

Development of Northeast Region

While there are significant opportunities for the development of the North Eastern Region resulting from its unique location, it also faces tremendous geopolitical challenges. Bordering to countries like Bangladesh and Myanmar brings the opportunity of strong political and economic ties, as well as the challenge of maintaining a geopolitical balance with China. The lack of a strong border protection mechanism, insurgencies, informal and illegal trading as well as illegal immigration are all obstacles affecting the NER's development. They directly or indirectly hamper trading and business opportunities.

The biggest opportunity next to political stability and border security lies in upgrading the NER's infrastructure. This will not only aid in developing trade, driving investments and promoting business but also aid efforts to contain illegal and informal trading, illegal immigration and insurgencies. For example, making border regions accessible for formal trade, security forces and so on.

The NER's infrastructure needs are manifold: there is an urgent need to improve the local transport system, the infrastructure of hospitals and schools as well as the communication services. There is a need for targeted incentives and planned schemes to tackle current gaps in infrastructure and supply-chain disruptions. Loans and other schemes supporting the modernization of agricultural and other businesses are required along with the setup of a robust commercial infrastructure.

This will not only boost development but support efforts to contain China's belligerent expansion in the region. The NER can emerge as a catalyst in shaping India's foreign policy vis-à-vis its immediate Southeast Asian neighbours. This will, however, require addressing the social, political and security challenges concomitant with the NER's unique geo-strategic Identity while developing its key infrastructure.

Land Availability

Land availability in the Tribal states is an issue. There is a need to create industrial estates or a policy whereby land can be taken on lease and be mortgageable to banks. Earlier Meghalaya allowed industries to take land from tribals, provided there was a local director.

Transport System

Historically, NER's economy was intertwined with the economy of its neighbouring countries. That has changed drastically after independence. Apart from small openings in borders with Bhutan, most areas and connectivity routes have remained out of access for trading purposes. Most importantly, access to Port and sea routes has become unavailable and will remain so until the completion of the paladin Multi-Modal project.

A quality local transport system which includes road-, rail- and air transportation systems, suitable to support the movement of import and export goods in larger quantities through the NER, is required. Ideally, old direct trading routes with neighbouring countries, as deemed fit, can be revived to boost trade with direct neighbours. The India–Myanmar–Thailand Trilateral Highway which is currently under construction under India's Look East Policy is a perfect example of what is currently needed. It will connect Moreh, India with Mae Sot, Thailand via Myanmar. The Kaladan Multi-Modal Project is another example of infrastructure development aiding the development of the NER.



Railways

Welcomed and needed developments would be two rail links connecting the NER to Chittagong Port, the 15 Km long Agartala – Akhaura line and a line from Mahisasan (Karimganj) to Shahbajpur (Sylhet), comprising 11km. To facilitate large-scale border trade, further railway connectivity is required to border towns like Golokganj or Zorinpui as well as to South East Asia through the Silchar – Mandalay Line via Imphal & Moreh/ Tamu & Kalay and the Ledo – Magaung Line.

Airways

New airports and heliports should be set up to boost airway connectivity. It is of utmost importance for the development of local industries that airports include new air cargo terminals which are duly connected to a local road and rail system. The same should be set up in all states and in all important airports. These airports should offer direct flights to ASEAN & BBN Countries under the UDAN (International) Scheme –VGF , already offered by Assam.

Inland Waterways

There is an urgent need to develop both domestic and international cargo service stations at key waterway routes, for example from Dibrugarh to Haldia and Silchar to Haldia via Bangladesh to export Tea, Coal, Petroleum, Cement and alike. Food grains, fly ash, steel, and other items may be imported from Kolkata through waterways. This would require the regular dredging of Brahmaputra and Barak in India and Bangladesh to maintain a minimum draft as well as the development of port towns, both existing and new ones. To aid waterway trade, slipways and ship-building facilities ought to be developed through appropriate schemes.

Highways

Direct international trade to neighbouring countries can be promoted through land routes, for example, currently, a direct highway route from Mangaldoi to More to Kalan would drastically shorten the time and effort to transport goods from Magaldai to Kalay.

Schools and Hospitals

High-quality schools and hospitals drive the settlement and the development of a quality workforce. Developing a robust educational and health system infrastructure would include measures to tackle local unemployment by developing the local workforce through training and upskilling. Harnessing the power of AIIMS, Medical Colleges and health facilities, both existing as well as future ones, can aid the development of a strong, robust health system. Promotion of higher studies educational facilities like IIT, IIIT, NIT, Engineering Colleges, Central and State Universities as well as National Repute Research Centres can build a competitive workforce as well as attract talent to the region.

Commercial Infrastructure

Special incentives should be allowed for the development of sectoral parks, incubation centres, power plants, food processing facilities, cold storage, warehouses, trade hubs and packing facilities as well as other key commercial infrastructure. The lack of basic infrastructure and its negative impact on trading opportunities can be best highlighted by challenges faced in the agricultural and forestry sector. Though the NER could supply, for example, a significant share of international demand for Bamboo, there are local logistical challenges at each step of the production chain hampering its export and trade.



Export Potential from Northeast India

Despite the central government recognising the Northeast as a trade gateway for India's economic engagement with its neighbours and members of the Association of Southeast Asian Nations (ASEAN), among others, International trade from the Northeast Region (NER) remains minuscule when compared to other parts of the country and its own potential.

In FY-19, Northeast India accounted for only 0.13 per cent of India's total exports. ²⁶

By FY 20-21, the region's export share had seen a minimal increase to 0.156 per cent, which is quite low when compared to the rest of the country, as noted by a Parliamentary Committee. ²⁷

Further, **Assam constitutes a major chunk of the exports** from the region with a miniscule share from the rest of the states. In 2021-22, the state recorded **exports worth \$430 million.**

Some of the major issues hampering the economic activities and export capabilities of the region are its **limited manufacturing capacity and infrastructure inefficiency. The lack of major ports and ship repair facilities** in the region add to the high logistics costs, making the region unattractive for economic activities and trade that could potentially occur through border gateways within the region. Currently vessels and barges operating in northeast India have to avail the services of the ship repair facility in Kolkata, which leads to higher operating costs and longer voyage times.

The recent foundation laying for a **ship repair facility at Pandu inland waterway port in Guwahati**, which was in the doldrums for several decades, holds significance from the point of view of reducing logistics costs and saving time. ²⁸

²⁶ [Northeast accounts for only 0.13 % of India's total exports: ADB, East Mojo, 7 January 2023](#)

²⁷ [NE's part in exports mere 0.156% of country's total: Commerce committee, East Mojo, 29 March 2022](#)

²⁸ [In doldrums for 25 years, development of Pandu port gets new lease of life, Economic times, 17 January 2023](#)



The Northeast region is known for its **large deposits of oil, natural gas, coal** and land under **cultivation for agro-horticulture products, bamboo, and rubber**. Hence, the trade of agriculture and marine products, tea, coffee, rubber and spices in the NER holds potential for growth of exports from the region. Further, **an increased thrust on rubber and coffee sectors** can also lead to a rise in exports. The Agricultural and Processed Food Products Export Development Authority (APEDA) has also taken several steps to promote export of agricultural products from the NER. ²⁹

Further, **improving trade facilitation measures such as building border infrastructure** that improves trade connectivity between the Northeast Indian states and its neighbouring countries, automating customs, and **reducing the prevalence of non-tariff measures** are actions essential for increasing trade and exports from the region.

While the current volume of border trade is relatively low, greater support and investments in the region's exporting capabilities can lead to improved transport infrastructure and enhanced economic activities.



²⁷ [How much do the Northeast states contribute to India's exports?](#), East Mojo, 19 December 2022



EXPERT VIEW



Dr. Samuel Dingliana

Chief Operating Officer,
Zoram Mega Food Park Private Limited,
Mizoram

The opening up of the north-east as a gateway to Southeast-Asia has been a long-standing ambition for successive governments at both in the Central and State level. The focus has rightly been on developing the requisite infrastructure like the Kaladan Multi Modal Project to bring this to fruition.

However, something that has been less talked about is *how and whether* local communities will directly benefit from these new linkages. While the country as a whole will undoubtedly benefit from access to these new markets, mechanisms are essential to ensure that these benefits also accrue to the local populations in the border states.

There is a need for clear focused **executable policies** to develop and support local organizations both in the private and public sector to leverage locational advantages to provide directly relevant services like cargo-handling, warehousing and goods processing as well as ancillary services like hospitality and liaison services. The vision and will to prioritize local needs could go a long way in bringing in much needed employment or economic development to the area.



03

Northeast Focus Sectors and Opportunities





3.1 Northeast Champion Sectors

Key industries in the Northeast include agriculture and food processing, floriculture, horticulture, mining, tourism, hydroelectric power, handlooms, handicrafts, and oil and gas.

Tourism



The North-eastern region (NER) of India has a diverse culture, scenic spots and rich natural resources that can be leveraged for tourism. To encourage domestic and international tourism in the region, the government has been developing infrastructure on a war footing and promoting cultural festivals.

- As per a report from the Comptroller and Auditor General of India, tourist inflow into the region rose from 71.62 lakh in 2014-15 to **over one crore visitors in 2018-19**.³⁰
- In a big boost to Tourism in the region, **Kaziranga was identified as one of the 17 sites for development** in the country under the Central government's 17 Iconic Tourist Sites in India, focussing on better facilities/experience for the tourists at the site.³¹

Tourism Infrastructure

- In a big boost to infrastructure connectivity in the region, **80 projects worth Rs 2,598.15 crore were sanctioned** up to 31st March 2022, for tourism related infrastructure in sectors such as power, connectivity, and water supply, among others, under the Northeast Special Infrastructure Development Scheme (NESIDS).³²
- Further, around 63 projects worth Rs 302.51 crore were sanctioned through NEC up to financial year 2021-22 for the development of tourism.³³

Sector Roadmap for Development of the Tourism Sector

- 1 There remains immense potential for development of tourism in a diverse number of areas that include **adventure tourism** through mountaineering, trekking, etc, **cultural and pilgrimage tourism** due to the presence of several pilgrimage sites and cultural festivals, and **sustainable or eco-tourism** due to the abundance of natural beauty, several national parks and wildlife sanctuaries present in the region.
- 2 To leverage this vast potential in areas of adventure, cultural and ecological tourism, a **regional action plan** is currently under consideration for the development of tourism in consultation with States and all active stakeholders.
- 3 While various promotional campaigns are currently under implementation, the central and state governments need to invest more time and resources in building a **strong brand image for Northeast India** as a tourist destination, emphasising on the increased connectivity and diverse attractions to attract more domestic and foreign investors.

³⁰ [North East states saw steady rise in tourist inflow in 5 years till FY19: CAG](#), Livemint, 19 March 2021

³¹ [Kaziranga amongst India's 17 Iconic Tourist Sites: Centre](#), NE NOW News, 16 March 2020

³² [Achievements of Ministry of Development of North Eastern Region](#), PIB, 28 December 2022

³³ [Achievements of Ministry of Development of North Eastern Region](#), PIB, 28 December 2022



Hydroelectric Power



The Northeast Region (NER) has immense potential in the hydroelectric power domain with several rivers such as Brahmaputra, Barak, Teesta flowing through the region. While the government has been working to build and improve the existing power infrastructure such as transmission lines and substations, there is a need for promotion of private sector investment in the hydroelectric power sector to increase power generation capacity and utilise the untapped potential of the region as an energy powerhouse.

Currently, the Region **ranks the lowest in the country in terms of per capita energy consumption** on account of its inadequate infrastructure, inhospitable climatic conditions, and inaccessibility of geographical locations etc. that are among the main reasons for comparatively lesser industrialisation than the rest of the country.

- The NE Region is blessed with **huge hydro potential of about 58,356 MW** (>25 MW), out of which 2027 MW (about 3.47%) has so far been harnessed as on 30th November 2021. Additional 2120 MW of hydro power are under construction. The balance of about 92.9 % is yet to be exploited. Contribution of NEEPCO in the hydro installed capacity of NER is 1,525 MW i.e., about 75.23%. ³⁴

The government can also promote small hydro projects, which are less capital-intensive and can be implemented quickly, to increase the power generation capacity in the region.

- **Small hydro potential in Northeast India is estimated at 3261.49 MW.** States such as Arunachal Pradesh (2064.92 MW), Sikkim (266.64 MW), Meghalaya (230.05 MW) and Assam (201.99 MW) show major potential for Hydropower. ³⁵

Overall, the development of the hydroelectric power sector in Northeast India requires a comprehensive approach and the cooperation of all stakeholders. With continual improvement of infrastructure and communication facilities, the Northeast Region stands to become the energy powerhouse of India.

Sector Roadmap for Development of the Hydroelectric Sector

- 1 **Feasibility studies** including environmental and social impact assessments to ensure sustainable development, along with a **cost-benefit analysis** are essential for going ahead with any hydroelectric project as several projects in the region have faced several issues from environmental agencies and departments over environmental and geological issues.
- 2 There is a need for **strengthening existing institutions** such as the North-eastern Electric Power Corporation (NEEPCO) and NHPC (National Hydroelectric Power Corporation) for better monitoring of hydroelectric power projects and bringing on board private sector players to set up Hydro Electric Power Projects to help bridge the gap of shortage of funds, raise the necessary capital and reduce reliance on the central government for funds.
- 3 An increased **focus on capacity building and transparency** will help build up the capacity of local communities and businesses to participate in the hydroelectric sector in the region and ensure competition takes place in a fair and competitive manner.

³⁴ [Power Potential in the North Eastern Region](#), NEEPCO, 19 January 2022

³⁵ [Power Potential in the North Eastern Region](#), NEEPCO, 19 January 2022



Handicrafts and Handlooms



Handloom and handicrafts have been an important source of income for many families with a rich tradition and heritage in Northeast India.

- Currently, the North-eastern Handicrafts & Handloom Development Corporation (NEHHDC) organizes **tour guide course for SC and ST youth** of the Region for self-employment generation.
- Further, the NEHHDC is also promoting **research and development on Craft Tourism** and allied activities like nature and agri tourism and is also pursuing the development of Craft Tourism on PPP model.

On its part, the government has been working to encourage **festivals that promote traditional crafts** such as weaving, pottery, and bamboo work, organizing and establishing comprehensive **skill development training sessions to artisans** to improve the quality of products and creating a supportive policy environment for artisans and entrepreneurs in the sector.

Sector Roadmap for Development of the Handicrafts and Handlooms Sector

- 1 The government must aim to build market linkages for artisans and entrepreneurs in the sector to improve their access to markets, leverage e-commerce platforms to increase the reach of the region's handicraft products.
- 2 Central and state governments must work together to Invest in promoting and creating awareness around branding and packaging of the region's handloom and handicraft products to increase their appeal.
- 3 Enhancing connectivity, both domestically and internationally, will make it easier for artisans and entrepreneurs to transport their products to markets, helping to reduce the high logistics cost involved.





Oil and Natural Gas



The Northeast region is rich in oil and natural gas reserves, with **Assam being the largest producer of oil and natural gas in the country**. The government has undertaken several steps for the promotion of the industry which includes promoting private sector investment in the oil and natural gas sector to increase production and exports from the region.

- The Northeast Region (NER) currently accounts for around **13% of the country's crude oil and 16% of the country's natural gas production**.³⁶
- Currently, Assam, Tripura and Arunachal Pradesh produce 12%, 29% and 6% out of the available total reserves of 6,766 MMToe, 560 MMToe and 43 MMToe respectively.³⁷
- As per the central government, it has approved **investments of over 1 lakh crore in the oil and gas sectors** for the region, which are likely to be completed by 2025.³⁸

Sector Roadmap for Development of the Oil and Natural Gas Sector

- 1 To increase exploration activities in the region, the government should **accelerate work on the Hydrocarbon Vision Document 2030 for the Northeast Region (NER)** released in 2016 that had outlined the necessary investments required to increase the production of oil and gas in the Northeast.
- 2 The government must aim to explore the **untapped potential of states in the region such as Nagaland, Mizoram, Manipur and Meghalaya**. Further, efforts must also be made to explore areas in the Northeast that have abundant resources of Shale oil and gas reserves.



³⁶ [What makes northeast the untapped powerhouse of India?](#), East Mojo, 14 January 2023

³⁷ [What makes northeast the untapped powerhouse of India?](#), East Mojo, 14 January 2023

³⁸ [1 lakh crore oil & gas projects approved for northeast](#), The Times of India, 25 September 2021

³⁹ [What makes northeast the untapped powerhouse of India?](#), East Mojo, 14 January 2023



EXPERT VIEW



Mr. Rajesh Saboo

Co-Founder
Cornerstone Auxiliary Services



Mr. Jasvinder Mukar

Co-Founder
Cornerstone Auxiliary Services

Amplifying Trade & Development in India's North-East Region

Introduction

The geostrategic location of India's North-eastern Region (NER), which shares borders with nations including Bangladesh, Bhutan, China, Myanmar, and Nepal, is advantageous for global commerce. The area is extremely abundant in wildlife and natural resources. Armed insurgency, border crossing migration, groups calling for distinct federal governments and autonomous areas, and ethnic disputes are just a some of the obstacles the NER continues to confront that prevent it from developing. The central government has launched several efforts to realign the NER with the country's key political and economic objectives. The Act East Policy is the most noteworthy of them (AEP).

The North-eastern States are economically significant primarily due to two factors: first, the region's strategic location connecting India to the robust Southeast Asian markets; and second, the presence of powerful input market catalysts such as social capital (diversity, cultural richness), physical capital (potential energy supply hubs), human capital (cheap, skilled labour), and natural capital (abundance of natural resources) (minerals, forests).

Trade Potential for Northeast Region (NER)

The AEP, which is aimed on constructing India's land bridge to Southeast Asia so that the regional economies may utilise the industrial networks, is built around the NER. In order to increase connectivity and trade between the NER and India's neighbours, subregional organisations like the Association of Southeast Asian Nations (ASEAN) and the Bay of Bengal Initiative for Multi-Sectoral Technical and Economic Cooperation (BIMSTEC) may be essential.

- The NER must utilize its geographic setting, cultural ties, and already-established trading networks with the surrounding nations. Raw minerals like as coal, limestone, boulders, and Agro-horticultural items are among the NER's major exports to Bangladesh (ginger and citrus fruits). Finished goods including cement, synthetic textiles, ready-made goods (RMG), and processed foods are among the imports from Bangladesh. Cumin seeds, cotton yarn, automobile components, soybean meal, wheat flour, and medicines are among the NER's top exports to Myanmar. Betel nuts, dry ginger, green and black mung beans, turmeric roots, resin, and medicinal plants are examples of imports.
- The NER has a huge potential for exporting food items. The region not only possesses adequate marketable excess in certain of these commodities, but also the agro-climatic conditions are favourable for the development of these items. For instance, the marketable surplus is sufficiently high for exports for pineapple (95 percent), jackfruit (83 percent), cabbage (74 percent), oranges (85 percent), and bananas (79 percent). Rice and maize are among the products that are now being legally exported through several LCSs along the NER, along with ginger, oranges, and betel nuts for Bangladesh and wheat flour, dry chilli, and dry grapes for Myanmar.



Call for Attention to NER

The NITI Aayog claims that output from outside the NER makes up the majority of India's commerce with its neighbours in East and Southeast Asia. None of the north-eastern Indian states contribute significantly to the country's commerce with its neighbours. This requires our whole focus. Due to its suitable soil and other Agro-climatic characteristics, the NER offers significant potential for agriculture commerce and exports. Without proper implementation of integration of NER into the subcontinent's trade plans, the perks of NER will go without their hundred percent utilization.

Way Forward

Some industries where NER's value chain potential with Bangladesh, ASEAN nations, and the rest of India has gone unused include agriculture, horticulture, floriculture, processed food, engineering, cars, textiles, and medicines. Livestock, horticulture, fisheries, agro-processing, and natural resource sectors all provide a variety of trade options.

Value chains spanning NER may potentially emerge once enabling supply chains are put in place. For instance, NER needs cold chains to increase trading. To do this, the Central and the state governments must work together.

A key component of boosting trade and commerce is the construction of transportation and communication linkages including roads, airports, and trains. Agartala, Aizawl, Shillong, Guwahati, and Bagdogra are some of the NER airports that need capacity development and more domestic and international flights, despite the fact that NE states have done better recently.

Cornerstone Synergy

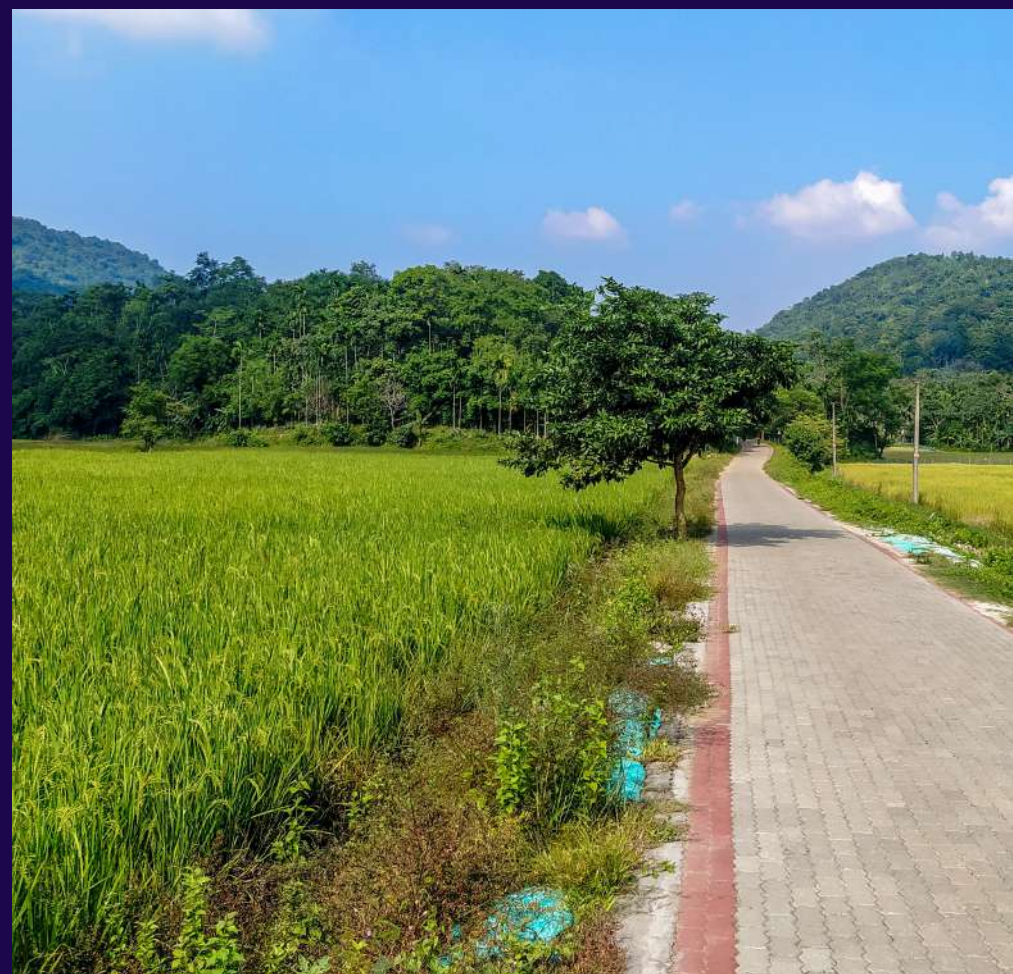
At Cornerstone Auxiliary Services We strive to meet the needs of our clients with transparent communication and professional commitment. The digital platform envisioned by Cornerstone aims to promote investment and facilitate trade in the remotest areas like that of the

Northeast region. We aim to set the benchmarking standards for one-of-a-kind professional investment life cycle service providers for the entire country including NER.

Conclusion

It is not disputable if India's NER has significant economic growth and cross-cultural interaction potential. Effective diplomatic relations, particularly with neighbours, depend on both of these factors. Closest neighbours of India, Bangladesh and Myanmar, have been instrumental in boosting and bolstering trade with the North-eastern states.

However, because the region is physically isolated from the rest of the country, it has logistical challenges that impede commerce. The harmony of the state and central governments and proper investment and strategic planning will lead NER to be a potential leader in trade and commerce.





3.2 Policy Initiatives

Government policy directly affects economic development, especially in the case of underdeveloped areas like the North-east, proactive government policy may significantly contribute to setting the direction and speed for the expansion of business and investment. The Government of India has implemented a number of significant legislative efforts since the late 1990s to draw investment into the region to help ensure greater government spending in key sectors like physical and social infrastructure, with the aim of providing access to the markets in South-East Asian countries.

Results thus far have not indicated considerable advancement. One of the key causes of this, it has been stated, is the absence of consistency in the policy environment. But it is believed that the lack of a comprehensive strategy to policymaking in the region has been an equal, if not a bigger, factor in the region's underwhelming economic progress.

Some of the policy initiatives that may be considered are appended below:

1



Integrated Investment Promotion Policy

The North-East Industrial and Investment Promotion Policy (NEIIPP), which came into effect in 2007, provided a wide range of advantages, such as a 30% capital investment subsidy, income tax exemptions, excise duty refunds, interest subsidies, etc. After undergoing a series of subsequent dilutions, such as the partial loss of the excise duty advantage, etc., the policy has now been stopped just as some outcomes were starting to become apparent and investors' interest was obviously growing.

2



Supporting MSMEs

Local businesses should get financial and administrative help, notably in the marketing area, so that enhanced infrastructure may be effectively used for the local population's economic development. There could be a North-East Innovation Fund established. A new area of growth and development may emerge through innovation. With help from the central government, a well-coordinated programme is needed to encourage artisans and the handcraft industry. For further marketing and branding, North-eastern items should be included in national and worldwide exhibitions. The tourist sector may potentially be negatively impacted by these operations.



EXPERT VIEW



Mr. Vaibhav Joshi

Co-Founder and CEO,
Easy Pay

The Micro, Small and Medium Enterprises (MSME) play a vital role in the development of a nation, in India they contribute to almost 30% of the GDP. The sector is also the second largest employer in the country employing close to 110 million people. MSMEs as a segment are even more crucial for the North Eastern states because they qualify as the top most segment in those parts. This is because there is limited Corporatization there, it is also evident from the fact that within the region MSMEs contribute to roughly 60% plus of the industrial output.

While the Northeast is home to roughly 1.5% of total MSMEs in the country, there is scope for the region to become an important player in the overall MSME development. MSMEs ride on the back of innovation and play an important role for development of rural economies. They help these regions become forward looking and foster an environment conducive towards industrialization. The North Eastern region is still a developing region, there is immense scope for MSMEs to play a pivotal role towards manufacturing, employment generation and overall enabling the region to grow.

The Government is supporting the region by the way of specialized grants and schemes for this specific geography. There are Financial Assistance based schemes for:

1. Setting up of new and modernization for existing mini technology centres: The Scheme envisages financial assistance to State Governments for setting up new and modernization of existing Mini Technology Centres, where the assistance will be provided up to 10 crore for land and machinery setup (up to 90% of cost).

2. Development of new and existing industrial estates: Assistance will be provided upto 8 crore towards cost of infrastructure facilities (up to 80% of cost).
3. Development of tourism sector: Assistance will be provided upto 4.5 crore towards project cost (up to 90% of cost).

The intent from the Government is clear, being development of MSME sector in the North-eastern region. The region is famous for exporting its manpower to more developed cities and urban migration is a normal course for a young adult. At the same time this region is one of the most disciplined, hardworking and community driven regions. There are areas within this region which follow a matriarchal society, which is an opportunity for growth for women driven MSMEs. Today majority of the MSMEs in this region are either women owned, or women operated. The region also has an export trading advantage due to its proximity to neighboring south easter countries. This region has tremendous scope for agriculture, handloom and handicraft produce export to these neighbors. These industries have been leading the growth of MSMEs in the region and has the potential of a 10x growth in the future. The border area development work in planning along with the road connectivity with most neighbors can pave way for this region to become the export hub to these south easter countries in the future.

There is a need for consistent capacity building across this region along with awareness of various government initiatives being deployed by the Government for the benefit of this sector. While there are sectors which are strong individually and have contributed to the growth of MSMEs (such as agriculture, handicraft, and handloom), there is a need to also explore other sunrise sectors that can help take the growth in a different trajectory. The right combination of intent, skill, opportunity, and capacity building can go a very long way in MSME development in the North-eastern region.



3



Act East Policy

Decentralizing discussion: While it is anticipated that the central ministry would continue to manage foreign relations communication, some local involvement, particularly with neighbouring provinces, should be permitted for operational convenience. The following programmes are suggested to help with these neighbourhood-level interactions.

Facilitating border commerce: Some of the policy approaches that had been considered in earlier policy initiatives, such as simplifying paperwork and assisting traders at the border, are intended to facilitate border trade with neighbouring nations.

4



Land Acquisitions for Industry

While acquiring land is getting more challenging and time-consuming nationwide, the situation is particularly onerous in the North-East since only scheduled tribes are allowed to transfer land in the hilly regions and certain other parts of Assam under current law. The states in the area must cooperate with the central government, business, and industry to create a solution that would safeguard tribal interests without limiting industrial development.



04 | Projections for Northeast India





4.1 India @ 75: Projections for the Northeast Region








Dedicated focus from Government of India aims to bring about fundamental changes in the region's socio-economic structure. It is expected that by 2024-25, the region will emerge as one of the fastest growing regions of the country and will contribute substantially to the national GDP. The region may become a hub of connectivity, trade and commerce

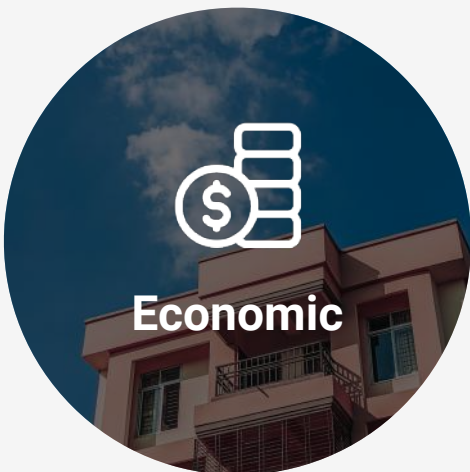
for the South-East Asian subregion and become a prominent player in the subregional economic development. The region's integration with the national economic mainstream can be complete and the region may be India's gateway to the east in the true sense of the word.



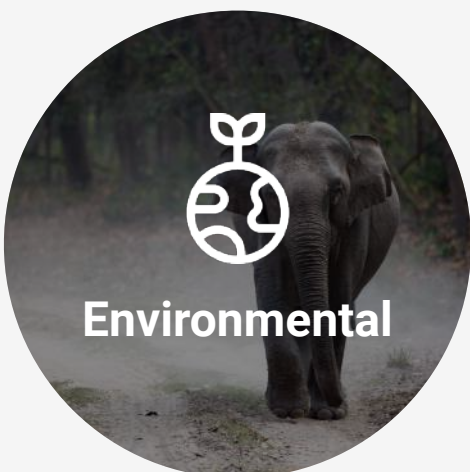
Snapshot of Projections for the Northeast Region




-  Sustainable **livelihood**
-  Improved **formal and vocational education**
-  Improved connectivity can give access to **better social amenities**
-  Access to **power** can improve quality of life
-  Access to **vocational education and employment** can have a positive impact on society



-  Increasing **investment** is expected to have a **huge trickle-down effect**
-  Direct **employment** for around five million people
-  **Smooth trade** with neighbouring countries and ASEAN
-  Exponential **growth in manufacturing**
-  Exponential **growth in services** led by tourism



-  Reduced impact because of **cleaner modes of transport**
-  Environmentally **conscious tourism**
-  Conservation of **biodiversity**
-  **Clean energy sources** like solar, wind, etc.
-  Planned development can help put **environmental protection mechanisms** in place



Future Outlook for Northeast India

1 Enhanced Connectivity

The region is anticipated to have **seamless connectivity to the rest of India, nearby nations, and ASEAN by 2025**. In a little more than 48 hours, it would appear conceivable to go from Guwahati to Bangkok by car. Ships from the Kolkata Harbour may be able to travel directly to Pandu and Badarpur via river navigation.

Remote areas of the region and all South-East Asia can be connected via flights. Benefits might be seen in increased farm productivity, an expanding manufacturing base, more foreign commerce, and a robust service sector.



Rail

- All state capitals
- Neighbouring countries



Inland Waterways

- Primary mode of goods transport
- Transit through Bangladesh



Road

- North-East ring road
- Asian Highway
- Bangladesh, Bhutan, Myanmar



Airports

- 24 operational airports
- Connected to Dhaka, Sylhet, Bangkok and Yangon

2 Growth in Trade

It is anticipated that **the North-East may represent at least 30 to 40 percent of India's commerce with Myanmar, Bangladesh, and Bhutan** under the projected development plan. The area may also represent a substantial portion of trade between India and ASEAN. With ten border townships, border commerce and collaborative manufacturing are anticipated to grow.



EXPERT VIEW



Mr. Suvankar Sen

CEO,
Senco Gold

As India looks to promote entrepreneurship, Northeast has received distinguished attention from the government authorities in recent years. With the improvement in connectivity and transportation over the last three years, coupled with concentrated administrative focus, the Northeast has become a desirable destination for entrepreneurs like us. More youngsters than ever before are headed to North-Eastern states to explore the region's untapped potential. Businesses are also making the most of the government's Northeast Industrial Promotion Policy and the budgetary support offered to the industry. The creation of Northeast Venture Fund (NEVF) for the region, with North-eastern Development Finance Corporation Ltd (NEDFi), will provide capital to start-ups in the region and attract outside investments.



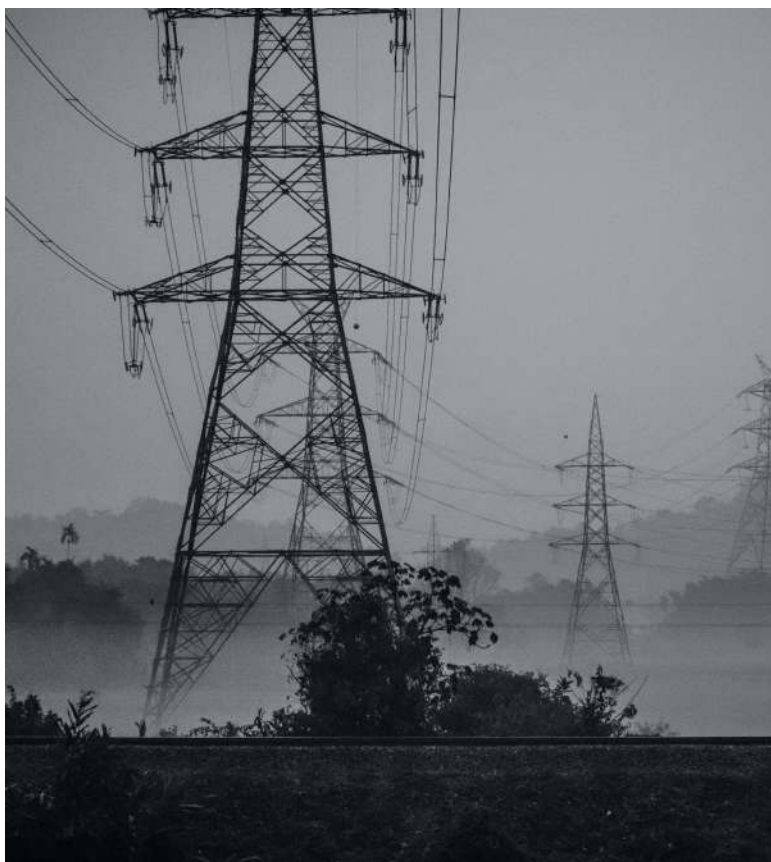


Sectoral Projections for the Northeast

Energy



Nearly 10,000 MW of extra electricity may be produced in the North-East, some of which might be supplied to other nations. By that time, shale oil exploration is projected to have started in Assam and Arunachal Pradesh, supplying a sizable portion of India's needs for fossil fuels. We also anticipate significant **advancements in clean energy sources like solar and wind**. A comprehensive mining strategy may be used to govern and direct coal mining in all the north-eastern states. While energy (electricity, oil, and gas) is anticipated to develop to be one of the region's most significant industries, the industrial sector may also experience expansion as a result of the abundance of energy.



Education



It is anticipated that the North-East will become the **centre of education for all of Southeast Asia**. **Collaboration with neighbouring nations** may be institutionalised at institutions like TISS, IIM, IIT, IIIT, and others. These institutions may become centres of excellence and generate ground-breaking research. The sector will undoubtedly be impacted by the **projected increase in private investment in education**.





Skill Development



It is anticipated that **vocational education would become institutionalised** and that students will be allowed to choose their job while still in school. Activities related to skill development are anticipated to receive a significant boost from a network of centres for that purpose and from a **Skill University**. The area may potentially become a significant source of skilled labour, notably for firms in the service sector. A higher level of economic activity may increase local demand, ensuring that only more highly skilled workers leave the area and obtain higher wages.



Environment



Environmental protection may receive more attention, and **by 2025, safeguards are anticipated** to be in place. A further boost to conservation efforts might come from ecotourism and other green enterprises. It could be possible for the area to increase its agricultural output in a sustainable way. It is anticipated that the region's **fresh water supplies would be utilised**, and conservation measures might start to bear fruit.

Tourism



It is anticipated that the area may become firmly **established as a significant ecotourism destination of choice for high end tourists** from throughout the world thanks to improved connections and a marketing effort. About 10% of India's foreign exchange gains from tourism may come from the North-East.





EXPERT VIEW



Mr. Vineet Agarwal

Chairman of ASSOCHAM
Cement Sector Sub-Council
and Managing Director of
Max Cement

India is the second largest cement producer in the world and accounted for over 8% of the global installed capacity as of 2019. India's overall Cement production for FY 21 is estimated to be more than 350 million MT which is expected to further rise to the level of more than 380 MT in the FY 22. This is largely due to the expanding demand of different sectors, i.e., housing, commercial and industrial construction, and infrastructure.

Cement Industry in Northeast India while still nascent but already has made significant contribution to the region of NE. In 2005 NE was buying more than 70% of its requirement from outside the region as there was very low production capacity in NE. Within 15 years the NE is now producing close to 12 million tons and contributing to NE development.

Over the years cement industry in NE has made pivotal Contributions to the socioeconomics of NE. Even though the region of Northeast has always been blessed with abundant natural resources, but it has significantly lagged the rest of country on basic infrastructure. To correct this anomaly and to bring the Northeast economically at par with rest of India, Govt of India set up aggressive development plans for NE vide its Look East Policy about 2 decades ago which was further enhanced as Act East policy in 2014 by successive government.

- Cement Industry in NE actively participated & helped the Government in creating various infrastructures in Northeast announced by the Government in its 'Look East Policy'. These infrastructures are very strategic in nature from the point of national security.

- It contributes to the tune of more than Rs. 2400 Crore annually by way of Direct as well as Indirect Taxes to the exchequer. Further It makes good amount of payment towards Royalty & Cess on various inputs used by it.

- Being a labour-intensive industry, it provides direct employment to more than 12,000 people and touches to the lives of 48,000 individuals. Another 80,000 individuals are benefitted by the industry which provides indirect employment to 20,000 people by way of their engagements in various peripheral activities happening around the Cement Industry in Northeast.

- Over the years It has made largest private investment in the region worth several thousand of crores.

- As a part of its Corporate Social Responsibility, Cement Industry in North east actively participates in various activities for the development of quality of life of the people of North East by building various social infrastructure in the fields of education, sports etc. In case of any natural calamity, industry suo-motto comes forward by providing various assistance to the affected people and also contributing the Relief funds set up by various States / Central Government.



Cement Industry in North East has come a long way from almost complete supply of cement required in the area coming from outside North East to the present annualised estimated production of more than 12 million MT at present in the region and increasing. This is despite the bottlenecks and high cost of operations that remain in NE. It has played a pivotal role in the creating strategic infrastructure in the area envisaged for overall growth of the region, created thousands of jobs and contributes thousands of crores of revenue to exchequer every year.

However In order to make higher contribution in the same, it needs some policy supports from the Government to remove some of the challenges that plague the industry:

- Cement Industry is facing lot of challenges in procuring various inputs required for manufacture of Cement. Majority of these inputs are minerals like Limestone, Coal etc are disrupted by regular policy changes. This has not only increased the cost of goods but created much uncertainty. Furthermore getting various clearances for mining like Forest Clearance, Environment Clearance continues to take significant time despite policy correction by the Govt. Majority of the states in North East are yet to finalise and clarify their Minor Mineral Policy in absence of which getting access to necessary raw material becomes challenging. Resolving these issues with a positive approach towards the industry will help the Industry in getting smooth & continuous supply of these crucial items for which almost no substitutes are available to the Cement Industry.

- Availability of Rail infrastructure in North East is very poor as compared to the other parts of the country especially in the area where cement industry is operating. In absence of the same, Cement industry in Northeast has to incur very high logistic cost as compared to the industries in other parts of the country. Moreover, they do not get the benefit of rail connectivity up to the point of manufacturing which deprives them the benefit of getting the inputs at a cheaper cost right up to their units and also on dispatch of their produce by rail network directly. Further Railways give 20% concession on the Normal Tariff Rate (NTR) which while benefits cement industry in other parts of the country sending their consignment to NE but it creates disadvantage for the local cement industry of NE.

Even the Road infrastructure in Northeast is yet to develop fully and the logistic costs by Road are very high in such a situation. For example, Railway Freight Between Satna (Madhya Pradesh) to Silapathar (Assam) having a distance of around 1742 Kms is Rs. 2,329. Whereas the same logistic cost would be incurred by the unit in Northeast for dispatch of material by Road to a distance of around 700 Kms only. With such a difference in logistic cost, viability of cement industry in Northeast can become challenging in future. The industry needs support in form railway infrastructure around the cement manufacturing areas of Meghalaya.

These issues should be discussed at a larger platform with the central and state governments both. Industry bodies like ASSOCHAM can provide the initial platform for holding stakeholder consultation.



4.2

Recommendation to the Ministry of Northeast and State Governments of Northeast to attract investments and facilitate trade from across the border

The current section focuses on recommendations to enhance trade and facilitate investments in the Northeast region. **The recommendations in the report are divided into 4 sections.** The first section talks about the policy actions required to boost cross-border trade. The second deals with the infrastructure and trade facilitation measures that must be implemented in

order to provide Trade additional incentives. The third pertains to the payment systems, without which trade would always encounter obstacles. Finally, the recommendations talk about how to solve the supply-side problems while keeping a medium-term outlook in mind.

Section A



Diversification of the Export Basket



Among the limitations faced by Northeast India in increasing exports is its narrow export basket. Diversification of the export basket in Northeast India is critical to ensure sustainable and inclusive economic growth in the region.

Currently, the **majority of exports out of the region come from Assam with agricultural products forming the main component** of the export basket. There is a need for diversification of the trade basket not just in terms of region, but also in terms of products as currently, the majority of exports are in the agricultural domain.

The development of a comprehensive export strategy based on an **assessment of the strengths of different states and identifying products with export potential from those regions** will be essential for diversifying the current export basket in the region. Further, export promotion councils, backed by central and state governments for various sectors such as aquaculture, chemicals, Oil and Gas and IT services can help to diversify and boost exports from the region.



2

Utilizing the untapped power potential of the Region through the development of relevant power infrastructure



The Northeast Region is often referred to as the energy powerhouse of the country. As previously mentioned, the NER accounts for around 13% of the country's crude oil and 16% of the country's natural gas production.

To exploit this untapped potential for power generation, the **government must work to**

strengthen power transmission and distribution in the growth centers and border towns while improving the efficiency in overall distribution system. Further, **building new power infrastructure** such as hydropower plants to utilize the vast hydropower potential will require efforts from the government to attract private sector investment into the region.

3

Powering the NER economy through urban centres



Cities have known to be growth engines of the economy and the same is likely to be the case with Northeast India as well. The region has nine cities selected as part of the Smart cities mission from across the region and should aim to fully utilize the funds granted under the scheme.

Cities in the region are **key to attracting investments** by providing access to a large and skilled workforce, infrastructure, and resources and can promote entrepreneurship by providing a

supportive environment for businesses to start and grow. The development of cities in the region will help boost exports, attract more private service sector jobs and boost the MSME ecosystem in the region.

Thus, **the continuing development of cities in the region** will not only act as growth engines for the states but also promote sustainable and inclusive economic growth, improving the lives of people in the region.



4

Increasing cross border trade within the North-eastern Region



Improving land-based trade across state borders will have a positive impact that will help boost local economies, create jobs, and reduce poverty. It will help to enhance regional integration by facilitating the movement of goods, services, and people across borders and promoting economic cooperation between states.

Increasing transparency in trade portals and simplifying customs procedures will greatly boost

trade within the different states in the Northeast region in the short term. Over the long term, the government must work to **develop border infrastructure projects and roads and highways that better connect the states** with each other to cut down on logistics costs improve connectivity between states, easing mobility for people of the region and making it easier for businesses to reach new markets.

5

Policy



The creation of "border haats" and conversion of Land Customs Stations into Integrated Check Posts would significantly increase border trade. Similar attempts can be conducted on the border between India and Myanmar, even if steps have already been taken to open the border with Bangladesh.

It is **necessary to review the India-Myanmar Border Trade Agreement** to significantly expand the list of goods that are now eligible for barter trade.

The 40-item list is no longer relevant, whereas every day or regular trading has grown in favour over time. Artificial obstacles, such as those imposed by the Border Trading Agreement, will only lead to the establishment of a parallel economy because practically all marketable products are traded via Moreh, the most significant trade point on the India-Myanmar border. Therefore, government may permit regular commerce to occur in conformity with the Foreign Trade Policy.



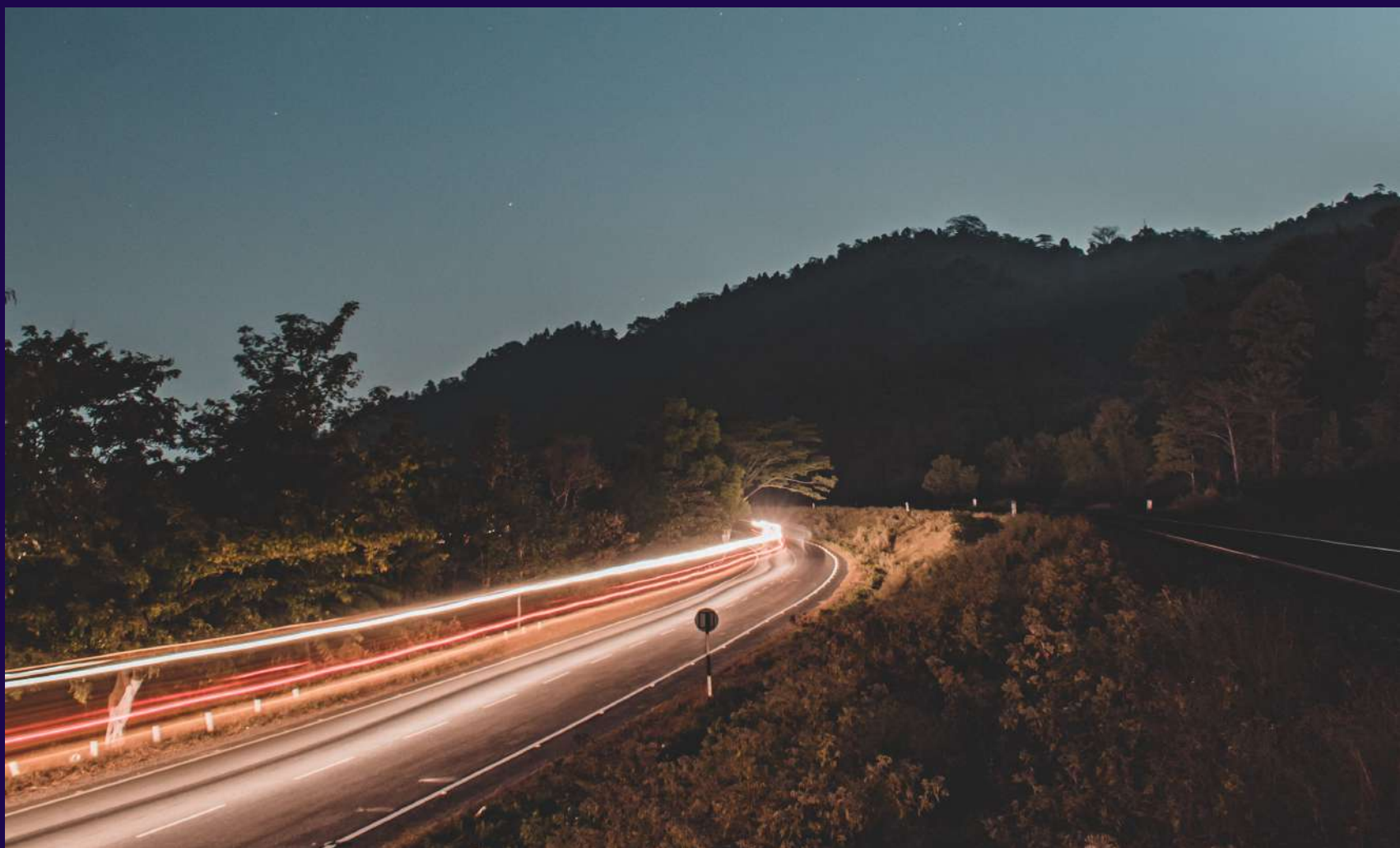
EXPERT VIEW



Mr. Rajesh Agrawal

Previously Principal Secretary (Home, Power, and Election), Government of Manipur Chief Electoral Officer, Manipur Resident Commissioner, Manipur Bhawan

The Northeast is a fast-growing market with untapped opportunities for investment, trade and tourism. I have no doubt that it is set to become a nodal point of India's growth story. It is abundantly endowed with natural resources, mineral and forest wealth, diverse flora and fauna, immense natural beauty, fertile land for cultivation of exotic fruits and vegetables, and above all an immense talent pool. It is truly a blessed land. The region is considered to be the bridge between Asia, South Asia, and Southeast Asia. As the region lies in a strategic location it can act as a key player in India's Act East-centric endeavours. Given its apt geographic location, long international borders, and proximity to ASEAN countries, I am certain that the region can become a trade hub, especially in services, not just for India but for the entire subcontinent.





Section B

6

Infrastructure and Trade Facilitation Measures



The Region is deficient in crucial infrastructure that would help to encourage border trade. It is **necessary to increase road connection**. Upgrades should be made to the State and National Highways that connect the Land Customs Stations to the rest of the nation. Improved access to commodities from the rest of the area and a reduction in the significant trade imbalances that India experiences at several of the trading terminals, particularly at Moreh, will result from improved road infrastructure. There is a **huge market potential for Indian goods in Myanmar** and maybe beyond that could be served if vital connection to the rest of the nation was

established.

The infrastructure should be improved in order to **increase the effectiveness of the customs authority and cut the lead time for approvals** to an absolute minimum. To lower the cost of transactions, appropriate trade facilitation measures would need to be implemented. In this regard, it should be noted that the **use of information technology (IT) and information technology enabled services (ITES)** has helped to facilitate commerce in many nations, and Northeast Region has to learn from these successes in order to do the same.

Section C

7

Payments Arrangements



The most significant obstacle to boosting border trade through official channels continues to be payment arrangements. This is **especially true for commerce between India and Myanmar, where the lack of a reasonable currency rate** that can be utilised for official reasons has hindered the legal trade at the border from taking hold. According to information, **the rate utilised in the grey market,**

where informal/illegal trading is conducted, is 210 times higher than the cross rate between the rupee and the kyat. The rupee has been the preferred method of payment for border trade between India and Myanmar. Thus, it is highly advised that two governments agree to conduct border trade in Indian rupees. This may be the initial step towards introducing rupee enabled trade.



Section D

8

Addressing Supply-Side Bottlenecks



There is a need to have a medium-term perspective to solve the supply-side difficulties to make **efficient use of the border trade points**, even though many of the initiatives mentioned in the above would result in the reduction of supply-side bottlenecks on the Indian side of the border. In order to do this, the Government of India will need to work with the relevant State Government to produce a detailed strategy that connects the development of certain NER sectors with the trade routes made possible by the border trade sites.

There is an urgent need to focus on trade-related capacity building/development amongst officials, entrepreneurs, for this is **the sine qua non for strengthening the human resource base**. Strengthening of human resources would only help improve the quality of services but will also encourage the stakeholders to take new initiatives. Structured programmes covering cross-cutting issues would go a long way in improving the delivery of trade-related services that would in turn help in the development of border trade.



About ASSOCHAM



ASSOCHAM initiated its endeavor of value creation for Indian industry in 1920. Having in its fold more than 250 Chambers and Trade Associations and serving more than 4,50,000 members from all over India. It has witnessed upswings as well as upheavals of Indian Economy and contributed significantly by playing a catalytic role in shaping up the trade and commerce environment of the country.

Our legacy has helped build a strong foundation for future endeavors wherein we serve as the Knowledge Chamber for the industry and become the conduit between them and the Government to foster development of a New India. Seen as a proactive and forward-looking institution, ASSOCHAM is fully equipped to meet the aspirations of Corporate India in the new world of business.

ASSOCHAM has emerged as the fountainhead of Knowledge for Indian industry, which is all set to redefine the dynamics of growth and development in the technology driven cyber age of 'Knowledge Based Economy'. We aim to empower Indian enterprise by inculcating knowledge that will be the catalyst of growth in the technology-driven global market and helps them upscale, align and emerge as formidable player in respective business segments.

Aligned with the vision of creating a New India, ASSOCHAM works as a conduit between the industry and the Government. ASSOCHAM is seen as a forceful, proactive, forward looking institution equipping itself to meet the aspirations of corporate India in the new world of business. ASSOCHAM is working towards creating a conducive environment of India business to compete globally. As a representative of Corporate India, ASSOCHAM articulates the genuine, legitimate needs and interests of its members. Its mission is to impact the policy and legislative environment so as to foster balanced economic, industrial and social development.

ASSOCHAM derives its strength from its Promoter Chambers and other Industry/Regional Chambers/Associations spread all over the country.





About Primus Partners



Primus Partners is a management consultancy and solutions focused firm that aims to navigate through the many opportunities that exist in the country. In a short period of time, Primus has established itself as a fast growing and premier Consulting firm with marquee projects and clients, including assignments abroad.

The firm has grown significantly and presently employs more than 150 professionals across its 6 offices in India working on 110+ consulting assignments.

The leadership team at Primus brings over 200 person-years of experience across sectors to develop and implement winning strategies for India and clients in Public and Private Sector.

Quality has been a focus right from start and the firm has been assessed at CMMi Level 3. Similarly, the firm also has 4 ISO Certifications, thus reaffirming its commitment to quality, information security and environmental norms.

People centric policies and development form the core of the firm and Primus has been certified as Great Place to Work for 2 years in a row.

Primus offers unique approaches to its clients to examine futuristic ideas required for the growth of a sector or ecosystem or organisation with key offerings being Public Policy Realisation, Investment Realisation, Impact Realisation, Technology Potential Realisation and Sector Potential Realisation.





Notes

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Disclaimer

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