



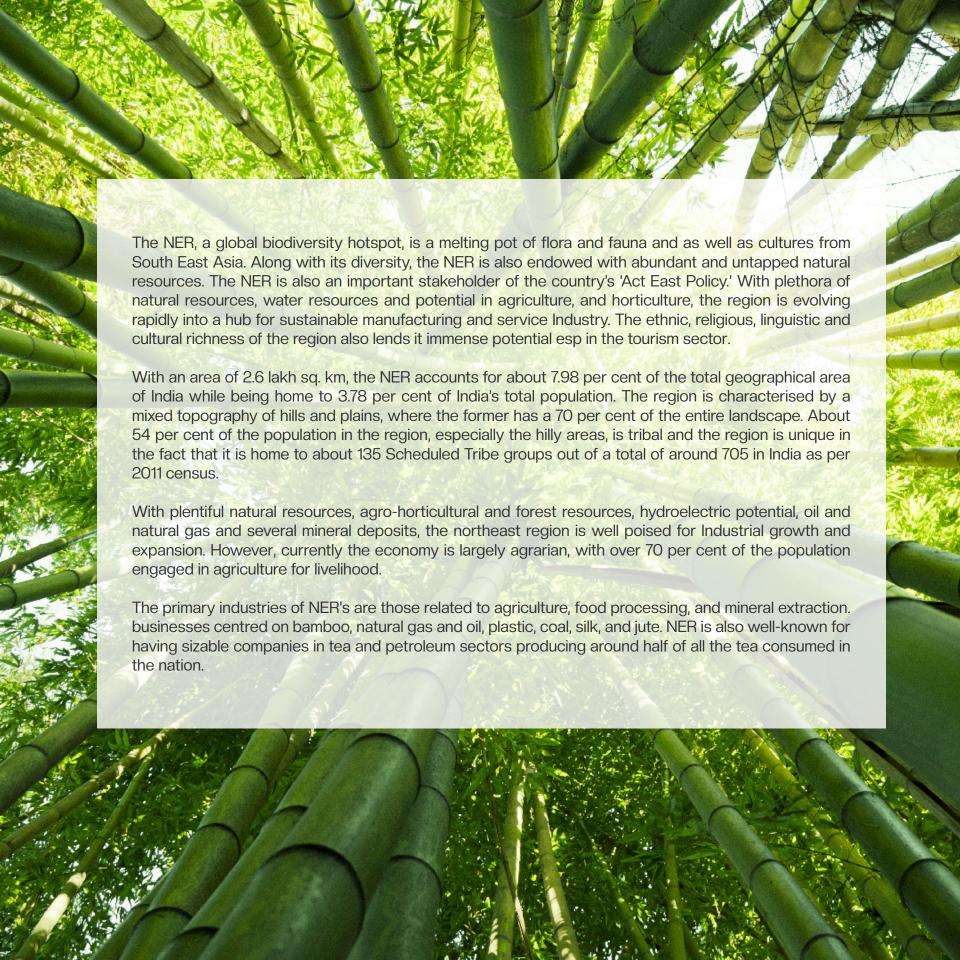


The North Eastern Region (NER), which includes the eight States of Arunachal Pradesh, Assam, Manipur, Meghalaya, Mizoram, Nagaland, Sikkim, and Tripura, is the easternmost region of India. Since each state has a border with at least one of the five nations to the east of the country, this area serves as a gateway to Southeast Asia and is of great strategic importance.

Moreover, the NER is regarded as one of Asia's regions with the most

ethnic and linguistic diversity, with each state exhibiting a variety of

cultures and traditions.





Key Economic Indicators

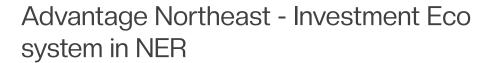
- The Region's GSDP at current prices is INR 5.75 lakh crore in FY 2021
- Compounded Annual Growth Rate (CAGR) of GSDP of North-eastern States grew at 8.17% from FY2015 to FY2022.
- Per capita income: The per capita income for the North-eastern region was Rs. 1,55562 (approximately \$1,490) in the financial year 2019-20.
- Connectivity Infrastructure: The region has a total of 13640 km of national highways.
- Infrastructure: 20119 Km of state highways, and 2,657 Km of major district roads
- The average road density per 1000 Sq. km of area is 2258.5 km against the national average of 1926.02 km

Snapshot of NER

States/Parameters	Airports	State High ways (Km)	National Highways (Km)	Waterways (Km)	Railway (Km)	International Border (Km)	GSDP 2020 -21 (lakh cr)	Per Capita 2020-21	Population (2011)	Literacy rate (%)	Area (Sq. Km)	Availability of Power (Crore Units)
	_	10500				0.170	0.040		4000 707	05.00		
Arunachal Pradesh	4	13500	2537	311	12	2170	0.312	154652	1,383,727	65.38	83,743	55
Assam	7	2530	3909	1938	2519	800	3.401	81034	31,205,576	72.2	78,438	570
Manipur	1	781	1750	44	13	398	0.341	84746	2,855,794	76.9	22,327	50
Meghalaya	1	768	1156	90	9	400	0.347	87170	3,366,755	74.4	22,429	145
Mizoram	1	170	1423	155	2	860	0.180	187327	1,097,206	91.33	22,081	36
Nagaland	1	650	1548	276	11	215	0.304	120518	1,978,502	79.55	16,579	51
Sikkim	1	663	463		0	319	0.318	403376	610,577	81.24	7,098	38
Tripura	1	1057	854		193	400	0.544	125675	3,673,917	87.8	10,486	90
Total	17	20119	13640	2814	2759	5562	5.747	155562-	46172054		263181	1035

^{*}At current price base 2011-12





Gateway to Southeast Asia: A strategic location that offers easy access to ASEAN markets.

Abundant Natural Resources: An abundance of oil, gas, coal, minerals, and timber for industries to exploit.

India's Green Hub: Home to lush forests and rich biodiversity, it is an ideal destination for ecotourism and agro-based industries.

Diverse Cultural Heritage: A region with unique ethnic communities and traditions that offer investment opportunities in tourism and handicrafts.

Government Incentives: A range of incentives, including tax holidays, subsidies, and reimbursements to support business growth.

Skilled Workforce: A young, educated, and skilled workforce that is proficient in English.

Growing Infrastructure: Rapidly developing infrastructure, including new industrial parks, and technology parks.

Stable Business Environment: A favourable business climate with a low crime rate, stable political environment, and supportive government policies.

Emerging Consumer Market: A growing consumer market with rising incomes and increased urbanization that offers immense potential for businesses.

Connected Northeast

Accessibility

The region has a good network of road, rail and air connectivity which provides seamless access to each corner of the region.

Road Connectivity

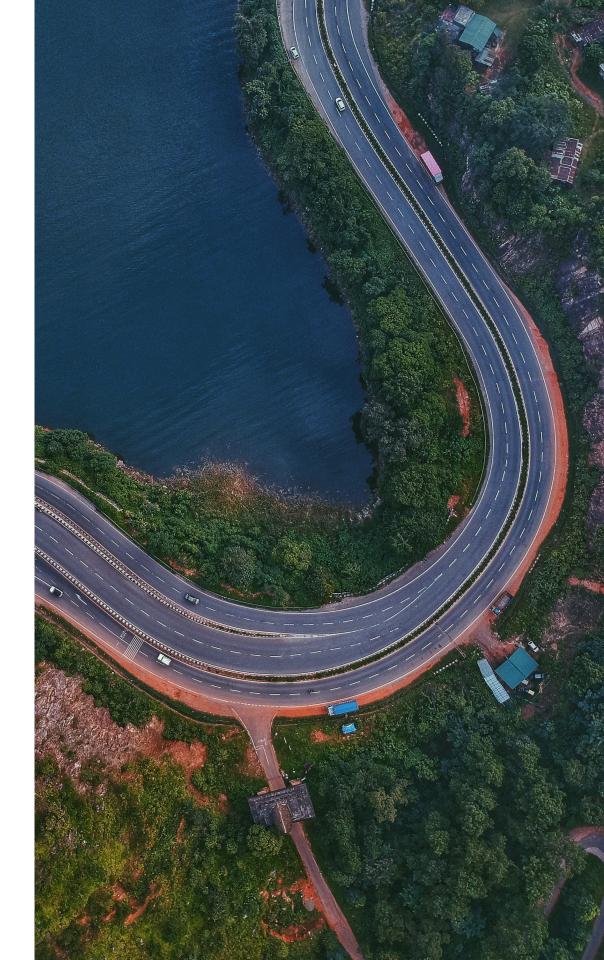
The region has provided round the year connectivity to all the industrial areas. To reduce the travel time between major cities and industrial areas within the 8 states, various four lane Highways are being constructed across the region.

Air Connectivity

The region has 17 operational airports situated across the 8 states. Also, helicopter is the fastest way to commute within the States, it has a few helipads with Heli Taxi service between main state capitals.

Rail Connectivity

The region has also connected with rail connectivity. To reduce the travel time between major cities and industrial areas within the 8 states, various rail tracks are being constructed across the region.



Education & Skill

Development Sector in India:Industry Overview

Education

- India has the world's largest population, in the age cohort 5-24 years amounting to 580mn and every fifth person in India is from age between 10 to 19 years
- Education sector in India is estimated to be worth \$ 117 bn and is expected to reach \$ 225 bn by FY25
- One of the largest networks of higher education systems in the world, 45,000-degree colleges, over 1000 universities and around 1500 top institutes
- Online education sector in India is growing rapidly, with growth of \$ 2.28 bn expected during 2021-2025
- Through Education 4.0 revolution India promotes inclusive learning and increased employability including cutting-edge technologies such as AI, ML, IoT and blockchain.
- Out of 36 Ed-Tech unicorn companies 7 are Indian which are valued at \$34.05 Bn in June 2022
- Inflow of US\$ 2.47 billion was received as FDI in education sector during the period of 2000 to 2019

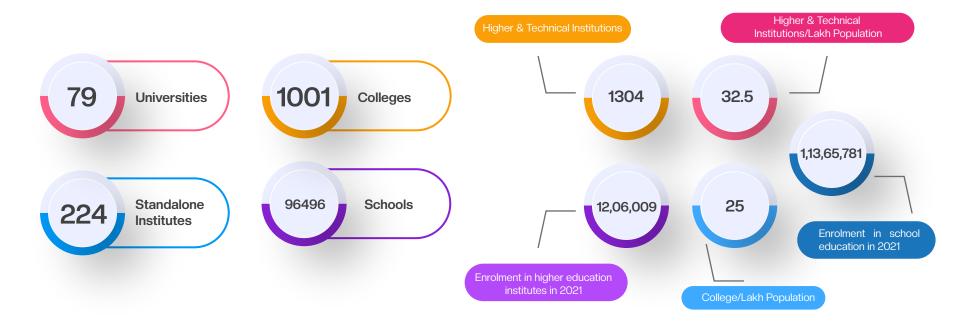
Skill Development

- India is the youngest country in the world, with an average age of 29 years, and home to a fifth of the world's youth population
- A third of India's workforce is composed of the millennials, who are aged 25-40 years
- India's huge informal labour market also stands to benefit from a restructuring due to creating an organised platform of skilling and job
- Under PMKVY 3.0, 3.74 lakh people have been enrolled, 3.36 lakh trained, 2.23 assessed, and 1.65 lakh certified as on Jan 2022³
- Under the PM SVANidhi Scheme street vendors could partner with digital platforms to facilitate delivery of their food wares.
 Platforms like Zomato and Swiggy have signed an MoU with the Ministry of Housing and Urban Affairs (MoHUA) to facilitate the upskilling and platform-onboarding of street food vendors on their food-tech platforms

Education & Skill

Development Sector in NER - Industry Overview

The Northeast region (NER) of India has 79 universities, 1001 colleges, and 224 standalone institutions of higher and technical education with 42,672 teachers. In the Primary and Higher secondary education sector, there are 96496 schools in NER.



State wise Institutions of Higher & Technical Education

Name of State	No of University	No of College	No of Stand-Alone Institutes
Arunachal Pradesh	10	42	14
Assam	28	595	93
Manipur	9	105	34
Meghalaya	11	75	22
Mizoram	3	39	19
Nagaland	5	68	20
Sikkim	8	23	8
Tripura	5	54	14

Focus on Women Education:

Parts of Northeast have traditionally been a matriarchal society, with women taking an active role in education and other social activities. The government has taken steps to encourage more women to take up higher education and vocational training.

Premier National Institutes in NER:

- The North Eastern region of India is home to a number of esteemed Government-run educational institutions, including the Indian Institute of Management Shillong, Indian Institute of Technology Guwahati, Rajiv Gandhi University in Arunachal Pradesh, National Institute of Design Jorhat, North-East Institute of Science & Technology Jorhat, Assam Agricultural University, Tezpur University, Mizoram University, and National Institutes of Technology in Silchar, Nagaland, Arunachal Pradesh, Tripura, and Manipur. These institutions are highly regarded for their academic excellence.
- In addition to these Government institutions, there are also several private universities such as Royal Global University, Kaziranga University, and University of Science, Technology & Management, among others, that are providing top-notch education to students in the region.

High Literacy Rate:

The North Eastern states have made significant efforts in promoting literacy, resulting in the region having a high literacy rate of 78.5%. This figure is significantly higher than the national average of 74%, making the North Eastern region a leading hub of literacy in the country. Moreover, the Gross Enrolment Ratio in elementary education in the North Eastern region is considerably higher compared to the national average, indicating a strong commitment towards providing access to education for all.

Incremental Human Resource Requirement in NER:

As per a recent study the incremental human resource requirement for NER is 171.14 lakhs during 2013-2022 and for the rest of India the same is 1032.2 lakhs across multiple sectors. As per Government data, in India, Food Processing and Rubber together has an incremental requirement for 40.4 lakhs from 2017 to 2022 and it was 49 lakhs in Tourism and Hospitality and 32 lakhs in healthcare. All these sectors have very bright growth prospects in NER thus implying the trends for human resource requirement would be reflective of the sectors across India. AS per as skill gap study in Assam which represent 60% of the population of north east, it has a requirement of total 5 Lakh manpower between 2020-25 which includes 52591 in manufacturing, 218761 in tea and 9346 in IT&ITeS.



Government Initiatives for Skill Development in NER

- 72 Pradhan Mantri Kaushal Kendra's (PMKK) have been established in NER during the period 2016-20.
- Under NSDC's Skill Saathi programme, over 50,000 people were counselled in the NER for skill development and career opportunities.
- 13.6 lakhs youths have been trained since 2016, of which 7.89 lakhs have been certified.
- To improve the livelihood opportunities of more than 80 thousand traditional arts and handicrafts artisans they have had their skills certified under the PMKVY in the region.
- Leading academic Institutions and universities such as CIPET, IIE, NIELIT, NTTC, CTTC, NIPMER, IIPM and CSIR have been engaged to conduct PMKVY – STT in the NER.
- State Skill Development Missions of NER have been engaged to implement RPL, especially in traditional job roles such as loin loom weavers, two-shaft handloom weavers, jacquard handloom weavers etc.
- Various training centres have been established in the NER under Technical Intern Training Programme, including two at Guwahati (Assam) and one in Pasighat (Arunachal Pradesh). Additionally, one of the leading organisations, Learnet Skills Limited (formerly IL&FS Skills Development Corporation Ltd.), has partnered with Oil India under its CSR initiative to support training 30 candidates at its Guwahati centre.
- Under, DDUGKY programme sponsored by MoRD 71317 students have been trained during the period of 2015-2022 as on March 2023

PMKVY-Achievements in North Eastern Region in FY 2019-2020

Scheme Type	Enrolled	Trained	Assessed	Certified	Placed
CSCM- Short Term Training	72, 882	63,104	53,527	47,317	23,244
CSCM- Recognition of Prior Learning	3,70,929	2,52,043	1,53,119	1,20,965	NA
CSSM- Special Projects	9,551	6,687	5,566	5,112	1,314
CSSM- Short Term Training	37,229	52,318	50,383	46,201	19,131
Total	4,90,591	3,74,152	2,62,595	2,19,595	43,689

The government has made significant strides towards empowering the youth by introducing various skill development schemes. For example, the Pradhan Mantri Kaushal Vikas Yojana has been instrumental in setting up Pradhan Mantri Kaushal Kendras at different locations across the region to foster the development of young individuals. In addition to this, several state governments in the North Eastern region have implemented schemes to support the skill development initiatives., investors can leverage these government initiatives and establish skill development centres to create opportunities for young people.



Total empanelled Training Centres in NER under Pradhan Mantri Kaushal Vikas Yojana (PMKVY)

States	Total empanelled TCs under PMKVY 2.0	
Arunachal Pradesh	103	
Assam	396	
Manipur	131	
Meghalaya	77	
Mizoram	78	
Nagaland	72	
Sikkim	35	
Tripura	174	
Total	1,066	

Industrial Training Institutes (ITIs) in NER

States	No. of it is
Arunachal Pradesh	5
Assam	28
Manipur	6
Meghalaya	11
Mizoram	3
Nagaland	9
Sikkim	4
Tripura	18
Total	84

The Northeast region boasts a thriving ecosystem of skill development infrastructure with immense potential for expansion, given the expected growth in human resource requirements for sectors such as Tourism, Retail, Agriculture, and Food Processing in the NER region as well as the rest of India. The government's initiatives, coupled with the demand for skilled human resources and the need for finishing schools in the area, present significant opportunities for private sector involvement in bolstering the skilling infrastructure of the region.



Competitive Advantage for Education & Skill Development Sector in Northeast

- Availability of skilled workforce and a growing pool of talent in the field of hospitality, tourism, health, engineering etc., the region is poised to emerge as a hub for the Education & Skill Development industry.
- The region's enabling environment clubbed with government policy frameworks attracts many private education institutions and skill development partners to set up their operations in the Northeast.
- NER's strategic location and proximity to Southeast Asian countries provides an excellent base for expanding into neighbouring countries and even ASEAN.
- The Skill India programs have taken significant strides in the North Eastern states, under Pradhan Mantri Kaushal Vikas Yojana, free skill training and certification across roles is provided to improve employability. This also indicates a government aided sustainable environment for training providers
- The Ministry of Skill Development and Entrepreneurship has allocated 103 Pradhan Mantri Kaushal Kendra multi-skill institutes for better employability of NER youths who are in demand in many industries such as retail, tourism, music, health care.
- As youth from the northeast have traditionally been preferred in industries like Retail, hospitability, BPOs etc there is an opportunity for training providers to explore opportunities in this region.



Investment Opportunities in Education & Skill Development Sector in NER

The education and skill development sector in the NER offers an excellent avenue for investment, given the significant changes it has undergone in recent years. Thanks to the increased government funding and initiatives aimed at enhancing the quality of education in the region, there is a growing demand for STEM subjects, vocational, and technical education. Investing in this sector can result in a more skilled workforce, which is essential for the economic development of the region.

There is an increasing demand for high-quality educational institutions in the North Eastern region (NER) of India. However, the availability of educational and skill development infrastructure lags behind the growing demand. As a result, many students from the NER have to travel to other regions of India, such as the north or south, to access quality education in well-established institutions. To address this gap, investing in education and skill development within the NER can create opportunities for students to receive quality education within their own region, which in turn, can facilitate economic growth and development of the region.

Overall, the education and skill development sector in the NER presents immense potential for investors. With the right investment and support, the region can produce a more skilled workforce, which is crucial for the region's economic growth and development.

Interstate Migration to other states for Education & Skills

The student migration rate in the North-East region of India was notably higher than the national average, with 6.9% of students moving between states according to the 2011 census. Specifically, 6.9% of students in this region migrated between states, compared to the Indian average of 2.5%. Among the eight states in the North-East, four of them - Manipur, Mizoram, Arunachal Pradesh, and Sikkim - observed a double-digit percentage of interstate student migration. In recent years this trend has further strengthened. Therefore, investing in the education sector in NER can help bridge the demand-supply gap and provide quality education to students in the region

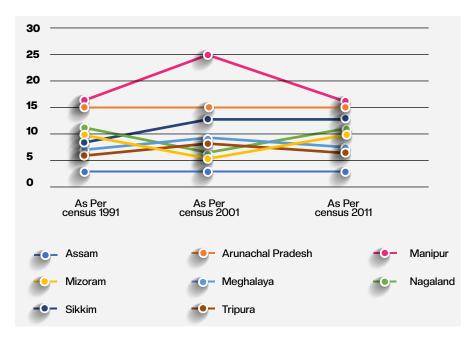


Fig: Interstate Student Migration (%) for Education & Skill Development Courses

Relatively unexplored potential in Education and Skill Infra

- The number of colleges per lakh population in NER is 32.5 which is low as compared to states like Karnataka (62), Telangana (53), Himachal Pradesh (50), Kerala(50). these states have almost twice the number of colleges per lakh population than the NER if not higher. This presents a significant opportunity for investors to invest in the higher education sector of the NER.
- Potential exists for investment in quality educational infrastructure like universities, colleges, technical institutions, skill
 development centres etc to cater to the local population as well as potential migrants from other states and neighbouring
 countries looking for higher and quality education. Excellent weather and serene nature perfect for educational institutes with
 residential facilities



State wise Institutions of higher education in NER

Name of State	University	College	Stand-Alone Institutes	Total
Arunachal Pradesh	10	42	14	66
Assam	28	595	93	716
Vanipur	9	105	34	148
Vleghalaya	11	75	22	108
Mizoram	3	39	19	61
Vagaland	5	68	20	93
Sikkim	8	23	8	39
Tripura	5	54	14	73

Academic Institutions in Top 5 States of India

Name of State	University	College	Stand-Alone Institutes	Total
Uttar Pradesh	84	8114	1148	9346
Maharashtra	71	4532	2153	6756
Karnataka	72	4233	1592	5897
Rajasthan	92	3694	514	4300
Tamil Nadu	59	2667	895	3621

State wise number of colleges per lakh population in NER

Name of States	Number of Colleges Per Lakh Population
Arunachal Pradesh	27
Assam	16
Manipur	33
Meghalaya	23
Mizoram	31
Nagaland	28
Sikkim	30
Tripura	13

Colleges Per Lakh Population in Top 5 States

Name of States	Number of Colleges Per Lakh Population
Karnataka	62
Telangana	53
Himachal Pradesh	50
Kerala	50
Andhra Pradesh	49
Puducherry	45
NER*	25

Emerging skillsets with new technology:

With quick diffusion of technology in platform-work, especially in the mobility economy provides an opportunity to identify suitable avenues of skilling needs. Most new technologies, especially digital, requires the acquisition of specialised skills, which has opened the platform economy to over 44.7% of the workforce, who have acquired smartphone skills in recent years. This presents an unprecedented opportunity for investors to set up facilities to attract students and skill enhancement especially of the younger section of the workforce in NER.

Investment opportunities in Education & Skill Development:

Investment opportunities in the Education & Skill Development Sector in NER includes:

Private Schools: Private schools are in high demand in North East India due to the region's growing population and increasing urbanization. Investment in private schools can range from building new schools to upgrading existing facilities. There is also a growing demand for international schools that offer a globally recognized curriculum.

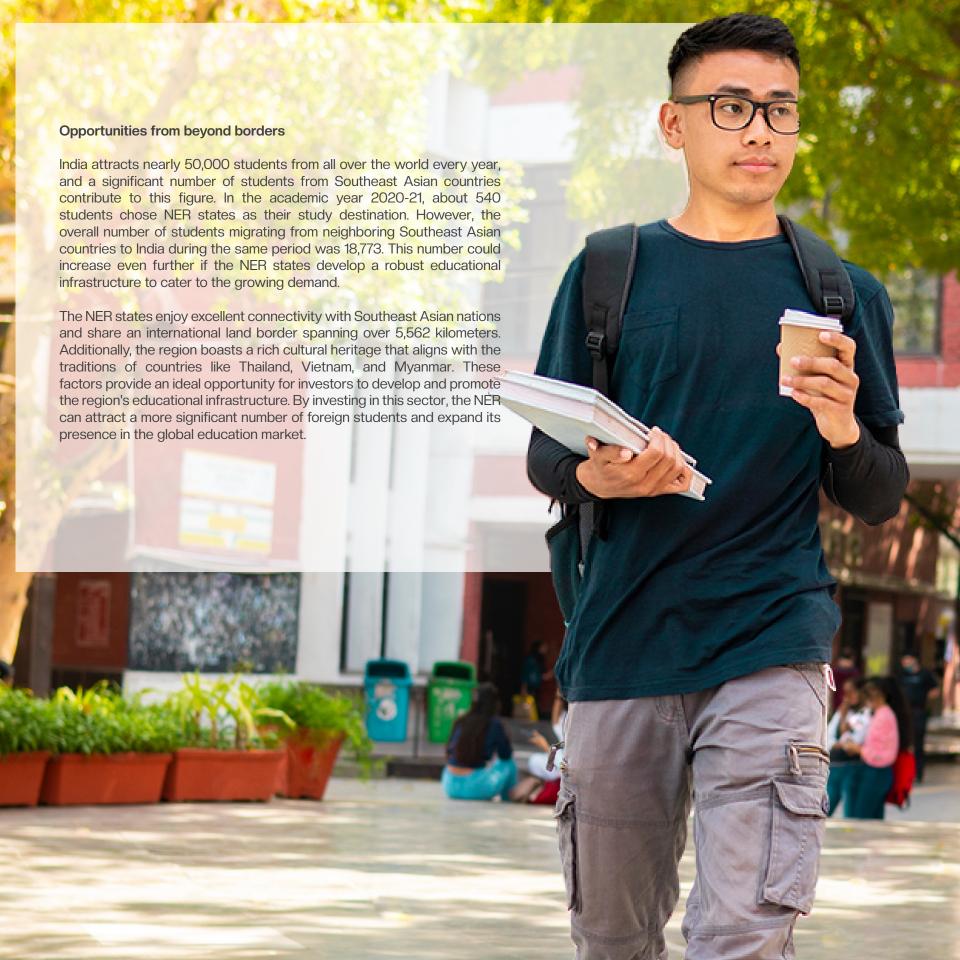
Higher Education: The North East region is home to several prominent universities, colleges, and technical institutes. However, the demand for quality higher education surpasses the available supply. To address this issue, investments in higher education can range from establishing new institutions to upgrading existing facilities and promoting research and development.

Vocational Training: The region is blessed with young people, and there is a need for vocational training to equip them with the necessary skills for employment. Investment in vocational training can range from setting up new training centres to upgrading existing ones and providing training for trainers.

E-Learning: The COVID-19 pandemic has accelerated the adoption of e-learning in North East India. There is a significant demand for e-learning solutions that provide quality education and access to remote areas. Investment in e-learning can range from developing new platforms to partnering with existing providers.

Skill Development: The North East region has abundant natural resources, and there is a need for skilled professionals in various sectors such as agriculture, tourism, and healthcare. Investment in skill development can range from setting up new training centres to upgrading existing ones and provides funding for research and development.

Research & Development: The region presents several opportunities for R&D in various fields, including biodiversity, traditional knowledge systems, renewable energy, agriculture and horticulture, and tourism. R&D in these areas can help promote sustainable development and contribute to the economic growth of the region.





State wise number of Foreign Students in NER during 2020-21

State	No of Students
Arunachal Pradesh	1
Assam	201
Manipur	21
Meghalaya	77
Mizoram	1
Nagaland	2
Sikkim	227
Tripura	10

Foreign Students from few neighbouring and South East Asian Countries in India during 2020-21

Country	No of Students
Nepal	13574
Bangladesh	2750
Bhutan	1827
Myanmar	161
Vietnam	134
Cambodia	13
China	83
Lao	5
Indonesia	226

The North-East region's advantageous location in close proximity to Southeast Asian countries presents a promising opportunity to attract students from this region. By establishing innovative educational and skill development institutions, investors can tap into this potential and cater to the needs of students from neighboring countries. This can contribute to the growth and development of the region's education sector and foster stronger ties with neighboring nations, ultimately driving economic growth and development.



Advantage Northeast for Education and Skills

- Investor friendly Climate for setting up schools and colleges and other infrastructure in NER
- Cordial Industrial Relations as the NER is also keen to facilitate Industry from all sectors
- Availability of Skilled Human Resource like trainers, educators etc for education sector
- Proximity & easy access to Southeast Asian countries like Nepal, Bhutan, Myanmar, and Bangladesh with potential to attract students from these countries
- Proactive administration in NER states
- Single Window Clearance Mechanism for G2B services
- Online Application and Approval for clearances and approvals with timebound delivery
- Excellent weather and serene nature perfect for educational institutes with residential facilities



Ease of Doing Business

Ease of Doing Business

Implementation of single window clearance portal in all the states of northeast for providing G2B services in a seamless timebound manner.

- As a measure to create a conducive business eco system, the states of North East India have implemented one stop single window system for all G2B permits and permissions required for any business activity
- Among many other features of the single window system, a notable functionality in the system is Centralised Inspection Module
 which helps in random allocation of inspection inspectors and joint site inspection thereby reducing the time, procedure, and cost
 of many G2B services.

Integration with NSWS

 The North Eastern states have onboarded or are in the process of onboarding their G2B services in the National Single Window Portal. This will enable investors to easily apply for business clearances for their investments in the region.

Industrial Policy for attracting investment in the region

To attract investment in the NER, the states have proactively implemented Industrial Policies which offer state specific incentives.

Preferential land allotment policy through creating of Industrial Land Banks

- Each state in the north ease has developed industrial land banks for ease of land allocation.
- Sector specific Industrial Zones like Plastic Park, Textile Parks and IT Parks have been developed in the region.

Reducing Compliance Burden

 NE States have undertaken an exercise to reduce compliance burden through a process of rationalisation and decriminalizing minor offences.

A robust feedback and grievance redressal mechanism

The states have put in place robust feedback and grievance redressal mechanisms to further improve ease of doing business.



Few Investible Projects in Education & Skill Development Sector

State Name	Project Name	Project Description
Nagaland	Mini Fab Lab attached to the Entrepreneurship Development Centres established in schools and colleges under the State Start-up Policy	To Institutionalize innovation and entrepreneurship in schools and colleges by providing facilitating environment and support mechanism whereby the students or the youths are encouraged and their capacity build for undertaking innovative and sustainable enterprises
Nagaland	Development of Advanced Skills Training Institute (ASTI) at Kohima, Nagaland - Aviation	The youth of Nagaland have the potential to make significant contributions to the development of the aviation sector in the state. However, to take full advantage of the opportunities this industry presents, they must be equipped with the right education, skills, and training. To support this goal, the state government is committed to providing investors with a range of benefits, including mobilizing suitable candidates to be skilled under various skill development schemes, CSR funds, revenue-based models, and more.
Nagaland	Conversion of Industrial Training Institutes (ITIs) to Modern ITIs aligned with Modern Technology	The Government of India has prioritized the promotion of skilling initiatives in recent years, recognizing their importance in driving economic growth and development. Industrial Training Institutes (ITIs) have played a crucial role in supporting the growth of various industries over the past few decades. To further this goal, the government is seeking private investment to support the upgrading of ITIs, enabling them to offer the latest technologies and training methods.
Sikkim	Centre of Excellence in Sikkim	Sikkim's local youth possess a diverse range of talents that can be harnessed in a variety of sectors, including IT and IT-enabled services, automobile manufacturing, readymade garments, handicrafts, hospitality, and garment production. To fully leverage this talent pool, it is essential to provide young people with the necessary training and skills to match their interests and chosen industries. Additionally, foreign language training in languages such as Japanese, Korean, and European languages can be offered to expand their employability across a wider range of international job markets in the Middle East and East Asian countries.
Sikkim	Rural Livelihood Generation Project in Sikkim	To foster entrepreneurship in the state, entrepreneurs will be offered financial assistance at a nominal interest rate. Technical guidance will also be provided to support their business development efforts. Revenue will be generated through credit extended to entrepreneurs and the promotion and marketing of the goods and services they produce.







Investment Promotion Partner



Industry Partner



Knowledge Partner

