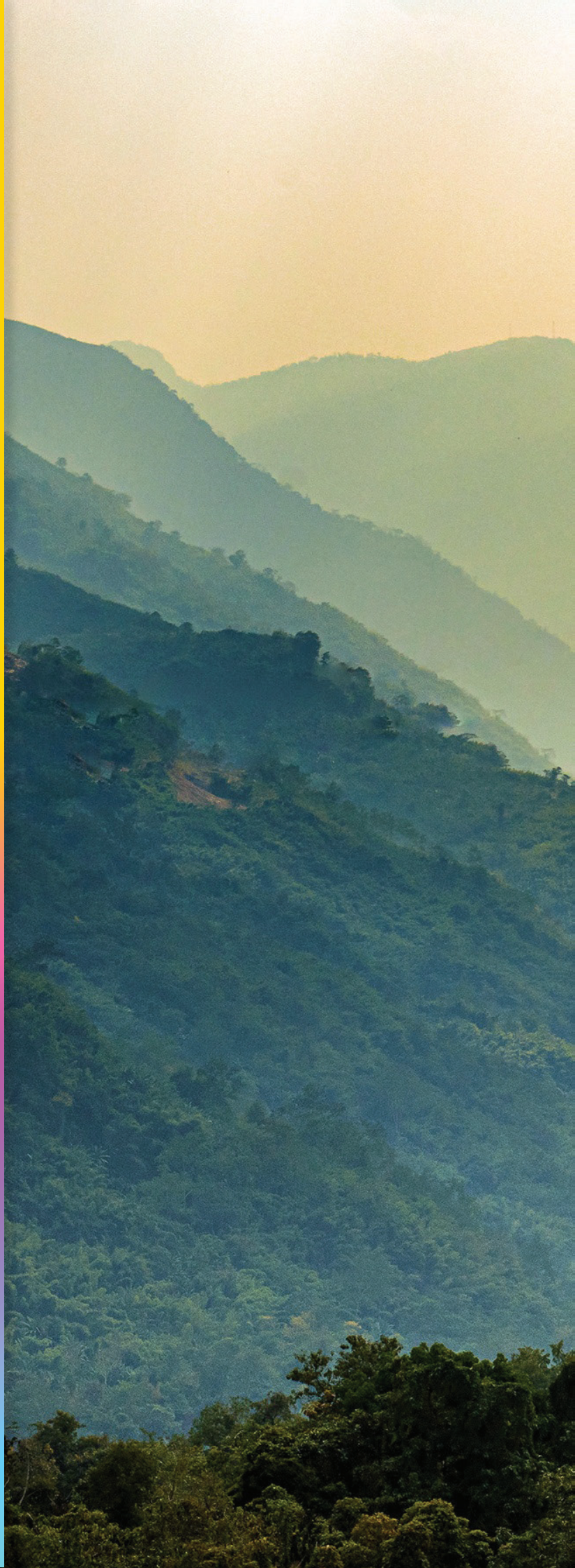


PART-4

Priorities and recommendations





A lush tropical forest scene with a waterfall cascading over rocks into a pool of water. The foreground is filled with dense green foliage and a rocky riverbank. The background shows tall trees and a dense canopy. A horizontal yellow line is positioned above the chapter number.

CHAPTER

19

Evolving agenda and additional steps



19.1 From Vision to viability: Outcomes and enablers for Viksit NER

Defining the metrics by which the North East Region would be considered "developed" by 2047 constitutes the essential first step in a broader strategic exercise – one that establishes clear, measurable endpoints against which progress can be tracked and accountability can be anchored.

However, metric definition alone does not generate a pathway to achievement. The subsequent analytical stage involves identifying the critical enablers and priority sectors required to make attainment of these metrics feasible. This requires moving from aspiration to diagnostic clarity: understanding which specific constraints – whether related to connectivity, institutional capacity, fiscal architecture, market access, or human capital – currently prevent the region from converging with national benchmarks and determining how these constraints interact and reinforce one another.

The underlying logic is straightforward: development outcomes are shaped less by isolated interventions and more by how effectively binding constraints are identified and progressively relaxed in the right sequence. For instance, improved physical connectivity may unlock sectoral potential, but only if complemented by regulatory predictability, access to finance, and relevant skills. The third stage, beyond the scope of this report, would translate these insights into a strategically prioritized and sequenced roadmap for execution – one that reflects available resources, implementation capacity, and the practical realities of coordinating action across multiple stakeholders and levels of government.

This report is deliberately scoped to the first two stages: defining what success can look like by 2047 and identifying the enablers and sectors that must

perform for those outcomes to materialize. The analysis is grounded in current regional, national, and global conditions, and in reasonable expectations regarding their evolution based on present evidence and trajectories. Several foundational assumptions underpin this approach.

- First, the region's development trajectory is not predetermined by geography or history, but is significantly shaped by policy choices, institutional performance, and the quality of execution.
- Second, convergence with more developed regions is achievable, but it is contingent on deliberate, well-sequenced action rather than the passage of time alone – advantages in natural resources, biodiversity, or cultural richness do not automatically translate into prosperity without the enabling conditions that allow these assets to be productively mobilized.
- Third, the broader enabling environment – spanning infrastructure, regulatory frameworks, financial intermediation, and human capital ecosystems – can ultimately determine whether sectoral investments generate sustainable outcomes or remain underutilized.

The analytical approach therefore prioritizes outcome orientation over input enumeration, systemic coherence over isolated project lists, and transparency about trade-offs and implementation challenges over narrative optimism. The objective is to provide a framework that is both actionable for policymakers and credible to stakeholders who expect rigorous, regionally informed judgment grounded in global best practice.



19.2 Strategic resilience and adaptive capacity

The strategic context within which the North East Region's development pathway must be pursued is characterized by heightened and persistent uncertainty – a reality that demands both clarity of direction and adaptive capacity. Multiple external factors can alter the relative attractiveness of sectors, the relevance of specific enablers, and the optimal sequencing and financing of interventions, often in ways that cannot be anticipated at the outset of a multi-decade strategy.

These factors include shifts in national policy priorities, changes in global supply chains and trade patterns, technological disruptions that redefine competitive advantage, climate events that affect infrastructure viability or agricultural productivity, and macroeconomic conditions that influence the cost and availability of capital. Many of these dynamics lie substantially outside the region's direct control. For instance, India's Production Linked Incentive schemes have rapidly reshaped investment geographies across the country, creating new anchors for industrial clustering that were not evident even five years ago; similar national or international decisions – whether related to semiconductor manufacturing corridors, green hydrogen hubs, or digital infrastructure backbones – can quickly elevate the NER's strategic relevance or, conversely, concentrate investment elsewhere if enabling conditions are not competitive.

The global shift toward supply chain diversification following pandemic disruptions has created opportunities for regions like the NER to position themselves as alternative manufacturing bases, particularly given proximity to Southeast Asian markets, but only if logistics reliability, regulatory predictability, and skills availability can match investor expectations. Similarly, geopolitical developments affecting India's eastern neighborhood – such as evolving relations with Bangladesh, Myanmar, and ASEAN economies – can significantly alter the viability of cross-border trade routes, the economic rationale for border infrastructure investments, and the region's positioning as a land bridge to Southeast Asia.

This uncertainty does not imply paralysis, but it does impose discipline: the articulation of a vision and strategy must be accompanied by a structured process of periodic review and recalibration. The underlying assumption is that strategy is not a static blueprint but an evolving framework that must remain responsive to evidence. Vietnam's experience offers an instructive parallel: its economic strategy has been continuously adapted over three decades in response to changing global conditions – from leveraging

bilateral trade agreements to repositioning within global electronics supply chains – while maintaining consistency in core priorities around export competitiveness and skills development.

For the NER, this requires establishing clear mechanisms for monitoring both external conditions, including national policy shifts, global market trends, and technological change, and internal implementation performance, such as whether connectivity investments are reducing logistics costs as intended, which agricultural or horticultural products are achieving market penetration, and where execution bottlenecks in land acquisition, environmental clearances, or financing are slowing progress. Real-time feedback from implementation can inevitably reveal differential rates of progress across initiatives: bamboo value chains may scale faster than anticipated due to strong demand for sustainable materials and relatively low entry barriers, while high-value tourism may encounter slower traction due to service quality constraints or infrastructural gaps that require longer gestation periods.

Ongoing reprioritization and reallocation of resources, attention, and institutional capacity may therefore be necessary to sustain momentum and support the strategy so that it remains aligned with both opportunity and constraint. The goal is not to avoid commitment, but to embed learning and adjustment into the strategic process itself – mirroring how successful states like Karnataka or Gujarat have iteratively refined their industrial strategies based on sector performance and investor feedback – ensuring that the region's development trajectory remains both ambitious and grounded in the realities of a dynamic and interconnected economic environment.

Operationalizing a region-wide growth strategy requires moving beyond state-centric planning toward coordinated spatial and economic development across the NER. Achieving national and international competitiveness will depend on aggregating scale through inter-state collaboration in core infrastructure, optimizing regional value chains, and strategically locating production, urban, and logistics nodes. This necessitates a shift from fragmented bilateral and multilateral arrangements toward cohesive regional planning. Regional planning architecture anchored by the North Eastern Council can provide integrated spatial design and coordination with central line ministries, enabling durable cross-state synergies. Complementarily, the Ministry of Development of North Eastern Region can serve as the execution integrator—aligning central and state



priorities, strengthening delivery oversight, and sequencing investments to ensure the region's natural and human capital are productively mobilized with the

right prioritization to accelerate progress toward Viksit status.



19.3 Fiscal support, convergence outcomes, and the next phase of growth

NER accounts for ~4% of India's GDP while housing ~4% of its population, yet it receives close to 10% of central government investment allocations – a deliberate fiscal transfer intended to accelerate convergence and address historical infrastructure deficits. This differential has supported growth rates above the national average over the past decade, enabling gradual narrowing of income gaps and improvements in human development indicators.

However, the pace of relative acceleration is expected to moderate as the region's per capita income converges toward the national mean, a pattern consistent with catch-up growth dynamics observed across other late-developing regions globally. Indian states such as Chhattisgarh's economic trajectory reflects phases of relative gain and subsequent normalization, with its share in national output rising during the mid-2000s before moderating over the last decade⁴⁵⁴, while internationally, China's inland provinces like Guizhou achieved double-digit growth through the 2010s before slowing as foundational gaps closed and sustaining momentum required more complex productivity and innovation-driven strategies⁴⁵⁵.

Early-stage convergence benefits from addressing foundational gaps – roads, power, connectivity, where returns are high and alternatives are limited. As these gaps narrow, sustaining above-average growth requires a qualitative shift: from gap-filling to productivity enhancement, from infrastructure quantity to infrastructure quality and utilization, and from input accumulation to enterprise competitiveness and innovation capacity. This transition is neither automatic nor guaranteed; regions can plateau at middle-income levels if investments fail to generate productive diversification or if enabling institutions do not evolve in tandem with physical infrastructure.

This trajectory heightens the importance of concentrating public investments in synergistic combinations – particularly infrastructure and urbanization enablers – that shorten the time required for enterprises to achieve competitiveness and scale.

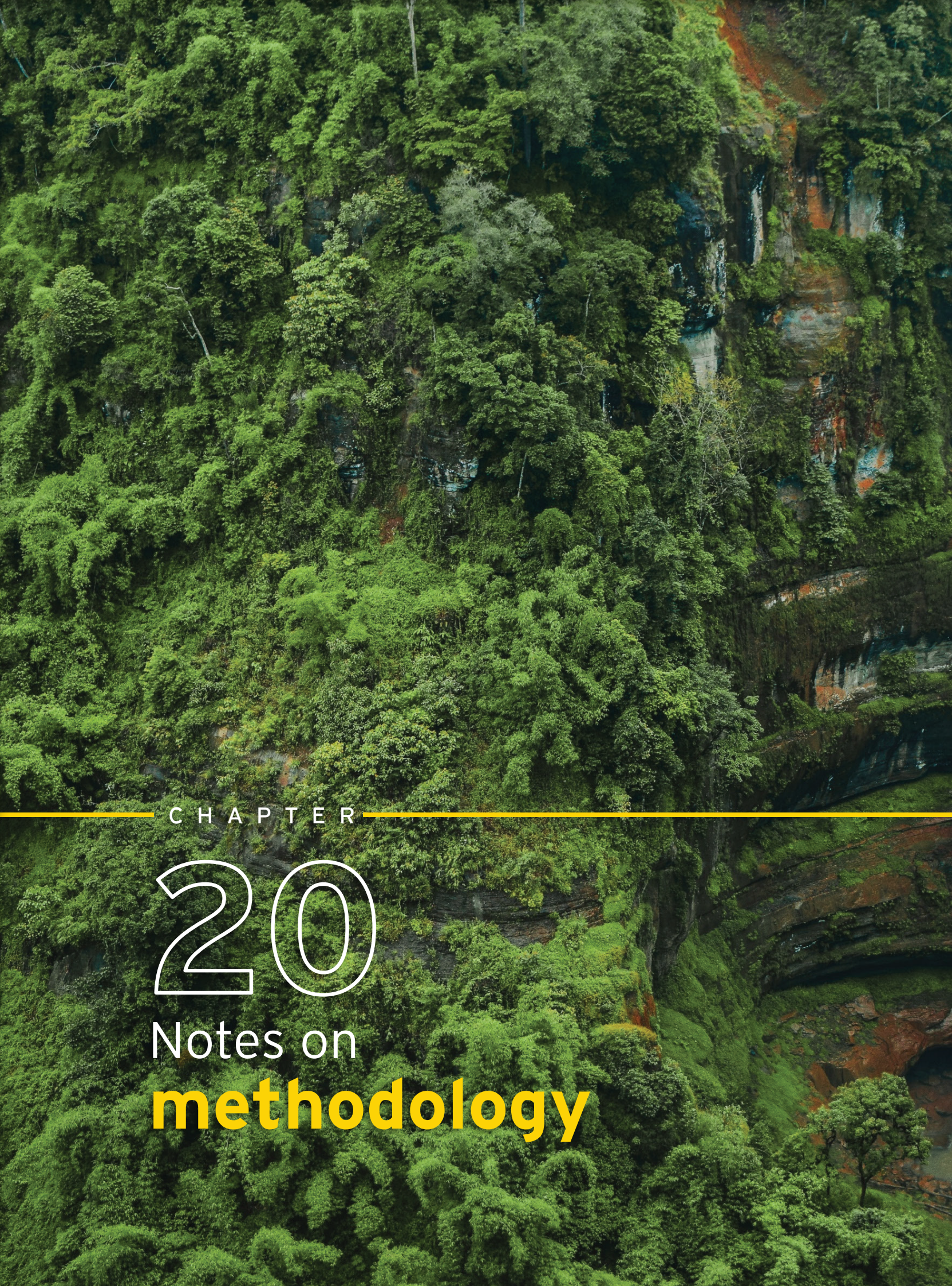
Public capital must be deployed not merely where needs are visible, but where complementarities are strongest and where catalytic effects on private investment and enterprise performance are most likely. For instance, investing in an industrial corridor without ensuring reliable power, last-mile connectivity, and streamlined regulatory clearances dissipates potential impact; similarly, funding skill development without corresponding demand from viable enterprises results in outmigration rather than local employment.

States like Tamil Nadu and Gujarat have demonstrated that strategic concentration, linking ports, industrial parks, power availability, and urban amenities, can generate self-reinforcing cycles of investment and growth, whereas fragmented allocations across too many priorities often fail to achieve threshold effects. In this context, and analogous to the integrative role played by PM Gati Shakti in transport and logistics – where cross-ministerial coordination and geospatial planning prevent duplication and enable network coherence – MoDoNER's coordinating function becomes critical not only in aligning central and state actions but also in providing strategic inputs on prioritization, sequencing, and ground-level implementation feedback. The ministry's value lies in its ability to synthesize information across sectors and states, identify where bottlenecks are binding, signal emerging opportunities or risks that require recalibration, and ensure that the region's constrained public capital is deployed where it can generate the highest developmental returns.

As fiscal space tightens nationally and competition for central resources intensifies, this coordination and strategic intelligence function becomes not merely administrative, but essential to sustaining the region's development momentum and maximizing the productivity of every Rupee invested. MoDoNER's developing a strategic roadmap for select focused opportunities highlighted in this report, and providing for a monitoring mechanism, go a long way in ensuring that the NER attains its Viksit status by 2047.

⁴⁵⁴ National Council of Applied Economic Research. (2025). *Macro and fiscal landscape of the State of Chhattisgarh* (Report). <https://ncaer.org/wp-content/uploads/2025/01/Macro-and-Fiscal-Landscape-of-the-State-of-Chhattisgarh-2.pdf>

⁴⁵⁵ World Bank. (2004). *China: Overcoming rural poverty and expanding opportunities* (World Bank Country Study). World Bank. <https://documents1.worldbank.org/curated/en/994301468752381260/pdf/278400v140China0lagging0prov.pdf>



CHAPTER

20

Notes on

methodology



20.1 Macro math strategic framework to attain Viksit NER by FY47

The macro math framework contributes to operationalizing the Viksit 2047 ambition for the North Eastern Region (NER) by translating its economic goals into quantified state-wise and regional outcomes: each of the eight states crossing ₹30 lakh per capita GSDP by FY47, alongside an aggregate regional GSDP of ~₹200 lakh crore. These metrics are arrived at through both top-down and bottom-up calculations. The top-down approach assumes NER captures ~4% of India's US\$30 trillion economy while bottom-up state growth modelling takes states from current per-capita GSDP to above the Viksit target for the region. This dual approach provides for analytical consistency while accounting for heterogeneous starting points across states.

The framework begins with state-specific growth arithmetic, estimating the CAGR each state requires based on its current per capita GSDP and the FY47 benchmark. This creates differentiated pathways rather than uniform targets: lower-income states require higher growth rates to enable catch-up, while higher-base states are expected to exceed Business-

as-Usual by at least 100 basis points to ensure closer to potential momentum. This encompasses the economic aspects of the Viksit ambition in clear, measurable growth and GSDP parameters over the 22-year horizon. As Assam, Tripura, and Meghalaya together contribute over 75% of regional GVA, these economies are intended to grow faster than the region as this will ensure the region attains its targets and also resulting in greater growth rates and potential across other smaller state economies.

Sectors are selected using a 15-sector regional priority framework, with each state adopting at least six sectors aligned to competitive advantage balancing coordination with flexibility and enabling complementary specialization. Overall, the framework reconciles state autonomy with regional coherence: outcomes are clearly defined, pathways remain adaptive. By grounding long-term aspiration in explicit growth arithmetic and anchor-led momentum, the macro math approach provides a disciplined, evidence-based foundation for region-wide convergence toward Viksit NER by FY47.

20.2 Strategic rationale for gross domestic product and per capita gross domestic product projections

Key assumptions:

Regional Aggregation: NER GSDP is computed as the sum of all 8 states' GSDPs; NER Population as the sum of all 8 states' populations. NER PC-GSDP is derived by dividing aggregate GSDP by aggregate population, with weighted averages applied for all PC-GSDP calculations.

Historical Baseline Data: For Manipur, Mizoram, Nagaland, Sikkim and hence the NER aggregate BaU growth is computed using FY14-FY24 CAGR, as FY25 GSDP data remains unpublished by MoSPI (as of 01.08.2025); FY25 values are projected from historical trends. Data sources include World Bank (2024), UN population estimates, NITI Aayog, and Census of India projections.

Customized Growth Targets by State: Target real and nominal growth rates have been derived for each state to maintain alignment with FY47 minimum income goal and atleast 100bps faster than BaU.

Currency Conversions incorporate 3.0% annual INR-USD depreciation of ₹ vs USD: 87 (2025), 116.92 (2035), 166.70 (2047) reflecting long-term historical

trends wherein the last 5, 10, 15 and 20 years, INR has depreciated by 3.9%, 3.4%, 4.3% and 3.5% respectively annually against USD.

Projection Framework and Time Horizon: Calculations are in nominal INR terms. Projections extend from FY25 to FY47 with a common goal: Achieving a developed economy per capita GSDP (PC-GSDP) of >INR 30 Lakh by FY47 across each NER state.

Nominal-Real GDP Conversion: Incorporating a deflator differential of 400bps between nominal and real growth trajectories, provides a nominal GDP growth rate consistently higher than input real GDP growth rate for FY35-47.

Business as Usual and Scenario 1 GSDP and PC-GSDP:

Business as Usual (BaU), FY25-47: The BaU scenario projects FY15-25 growth rates forward without incorporating additional transformative interventions. It serves as the analytical baseline against which the incremental gains from Scenario 1 are assessed.



Scenario 1: The per capita GSDP (PC-GSDP) trajectory operationalizes Scenario 1 through a sequenced growth path that combines front-loaded acceleration with structured normalization, while explicitly incorporating population dynamics. Rather than extrapolating a single rate to FY47, the framework assumes elevated real GSDP growth during FY25-35, followed by a return to historical averages during FY35-47, with population growth aligned to Census projections and stabilizing thereafter at 0.6% annually.

- **Phase 1 Acceleration (FY25-35):** The first decade is designed as a foundation-building phase, with annual growth targeted at least 100 basis points above each state's FY15-25 CAGR. The required acceleration reflects each state's current income level, the gap to the ₹30 lakh per capita GSDP threshold by FY47, and growth momentum driven by investment in infrastructure

that would serve as a springboard for subsequent activities.

- **Base effect leverage:** Strong interventions in the first five years are intended to close a substantial portion of the income gap with all of India within the first decade itself. NER's convergence trajectory from 70% of India's per capita GDP in FY15 to 83% in FY25 must be sustained and strengthened through this period to ensure that FY47 goals are achieved.
- **Infrastructure multiplier effect:** Front-loaded infrastructure investments during FY25-30, anchored in integrated and synergistic planning, are expected to generate employment and economic multipliers that extend into FY30-35. This sequencing supports sustained elevated growth during the acceleration phase.

20.3 NER core infrastructure investment framework

Figure 127: Three gears of the investment engine



The investment framework for NE Vision Plan 2047 estimates a total requirement of ₹69.0 lakh crore in present value terms over 22 years across priority domains. Using present value establishes a consistent capital baseline under current cost structures, enabling disciplined prioritization, sequencing, and resource allocation aligned to long-term output targets. Investment is structured around three mutually reinforcing growth gears

- Core infrastructure (including renewable energy)
- Urbanization
- Select 15 advantage sectors

Financing is expected to progressively rebalance from the current 50:40:10 (Centre: State: Private) structure toward 30:30:40 through FY47, reflecting rising private participation as markets deepen, risks moderate, and returns become more bankable. This calibrated evolution ensures fiscal sustainability while

crowding in private capital to sustain the Viksit NER trajectory.

NER infrastructure allocation framework

Use of NIP as the Baseline Reference Framework:

The infrastructure allocation pathway for NER through FY48 is anchored to sectoral shares derived from the National Infrastructure Pipeline (NIP), using actual distributions from FY13-19 and projected values for FY20-25 as the national benchmark. This provides a standardized reference point aligned with national priorities, subsequently adjusted to reflect NER specific conditions such as terrain limitations, dispersed settlement patterns, and structural economic composition.

Region specific recalibration of national priorities:

While NIP allocates significant weight to the energy and road sectors, the methodological approach moderates these shares for NER to avoid over

concentration in areas constrained by terrain and marginal returns. Capital is instead reallocated toward railways, industrial infrastructure, irrigation, and agri linked systems, which function as prerequisite enablers for productivity enhancement and ensure that national scale investments translate into meaningful regional economic gains.

Scenario based modelling of infrastructure intensity:

Infrastructure investment trajectories are developed under two macroeconomic scenarios to match capital deployment intensity with growth aspirations. The BaU scenario maintains infrastructure spending at 7.5% of GDP over FY25-47, consistent with historical expansion trends, resulting in annual investments rising from ~₹0.8 lakh crore in FY25 to ~₹81.7 lakh crore by FY47. Scenario 1 adopts a phased approach with elevated investment intensity of 10% of GDP during FY25-35 to close structural gaps rapidly, followed by normalization to 7.5% in FY36-47 as asset stocks mature.

Rationale for front loaded capital deployment: The methodological choice to prioritize early stage investment is grounded in established infrastructure led development dynamics, where long gestation assets generate compounding returns through network effects and productivity spillovers. Early sequencing ensures that gains in connectivity, market access, and agglomeration accumulate over time, creating a stronger platform for private capital participation during later phases.

Cumulative investment outcomes under scenario 1:

By FY47, Scenario 1 yields cumulative infrastructure investment of approximately ₹132.4 lakh crore, representing a 62% premium over the BaU pathway. This significant differential reinforces the analytical premise that infrastructure serves as a catalytic driver of structural transformation and GDP acceleration, rather than a conventional expenditure line. The timing of investment is thus central to the methodology, enabling NER's growth dividends to accrue progressively and supporting the region's transition toward Viksit status.

Sectoral alignment and divergence from national shares: The allocation framework intentionally diverges from national sectoral shares in areas critical to NER's structural constraints—specifically railways, industrial infrastructure, irrigation, and agriculture linked processing systems, where higher relative weights are necessary. Conversely, sectors such as urban infrastructure, roads, and energy retain broad alignment with national norms, with adjustments applied only where regional feasibility or economic logic warrants recalibration.

Urbanization investment phasing framework

Sequenced modelling of urbanization pathways: The methodology models NER's urbanization journey as a sequenced progression, aligning investment intensity with the evolving economic returns of urban systems. Urban development is structured into three distinct phases, reflecting the strengthening of multiplier effects as infrastructure networks mature and productivity linkages deepen. Population and FY47 outcomes are projected by extending 2021-36 demographic trajectories to 2047, drawing primarily on Ministry of Health and Family Welfare estimates, supplemented by datasets from the World Bank, Economic Surveys, and the RBI.

Phase I: Foundational asset creation: The initial phase prioritizes essential urban infrastructure – water, sanitation, roads, and baseline connectivity – required to establish minimum service thresholds. While foundational, this phase generates limited short term economic multipliers ($\leq 1x$), as spending is concentrated on asset creation rather than productivity enhancement. The methodological emphasis is on building system readiness rather than seeking premature economic returns.

Phase II: Expansion and systems integration: The second phase represents the transitional period where infrastructure networks begin to integrate, reducing logistics frictions and enabling residential, manufacturing and services growth. Investments in transport, power systems, digital networks, and service delivery elevate multipliers to the 1x-3x range as operational efficiency improves and urban centers start to activate their economic potential. This phase marks the shift from capacity creation to economic activation.

Phase III: Mature urban productivity systems: The final phase corresponds to urban systems operating as self reinforcing economic hubs, with strong induced effects through employment, incomes, and consumption. Multiplier effects rise to the 3x-5x range as agglomeration benefits, market density, and service ecosystems reach maturity. This structured sequencing ensures that returns intensify progressively rather than relying on front loaded expectations unsupported by system capacity.

Conversion of population growth into space demand:

Urbanization investment requirements are estimated by translating projected population increases into corresponding demand for commercial and residential built up space. Commercial investment is calculated using per capita incremental commercial space linked to workforce participation and multiplied by average



construction rates, while residential investment applies per capita housing norms and prevailing build costs. These estimates incorporate city category participation rates, per capita space standards, and construction economics to generate state wise present value requirements under alternative FY47 urbanization outcomes.

Linking demographic transition to investment needs:

As urbanization accelerates from the current ~28% toward the projected 55-72% range, investment requirements increase non linearly, reflecting agglomeration driven demand for workplaces, housing, and associated services. The methodology anchors projections in Census aligned demographic growth and construction cost structures, treating urbanization as a productivity catalyst rather than a purely real estate driven exercise. This approach positions cities as economic platforms, providing a disciplined basis for sequencing public infrastructure, crowding in private capital, and supporting NER's transition toward higher income, consumption led growth by FY47.

Fifteen Advantage Sectors Framework

Basis for identifying the fifteen advantage Sectors:

The selection of the fifteen advantage sectors—Tourism, Food Processing, Pharmaceuticals, Spices, Tea, Digital/IT Hubs, High Mix Manufacturing, Textiles, Bamboo, Fisheries, Pineapple, Rice, Rubber, Kiwi, and Minerals—is grounded in their demonstrated potential to materially expand NER's GSDP by FY47. The sectors are chosen using criteria of scalability, value addition potential, and region specific competitive advantage, ensuring alignment with economic structures unique to the Northeast. Each state is expected to prioritize a minimum of six sectors to maintain specialization while enabling diversification and the formation of cross state clusters and value chains.

Consolidated approach to Sector Level Projections:

Global and national market estimates for these sectors are drawn from industry projection studies and market research assessments, forming the baseline for long term modelling. Within this framework, the Spices category is treated as an aggregated sector encompassing ginger, turmeric, large cardamom, and related crops, enabling analytical consistency given their integrated production systems and common value chain dynamics across NER. This consolidated modelling approach provides a coherent structure for sectoral comparison while preserving the specificity of regionally significant crops.

Methodological treatment of the minerals advantage sector:

The minerals sector is incorporated as a strategic pillar based on NER's substantial and geographically diverse resource endowments—including coal, limestone, graphite, rare earth elements, vanadium, lithium, uranium, and key base metals—across states such as Assam, Arunachal Pradesh, Meghalaya, Manipur, and Nagaland. Its inclusion reflects both the demonstrated availability of extractable reserves and the significant potential for upstream to downstream value chain development capable of generating employment and anchoring industrial ecosystems.

At the same time, the framework deliberately avoids projecting long term revenue trajectories to FY47, recognizing that global mineral markets exhibit structurally high volatility, with annual price swings of 40-50 percent and multi year declines of up to 70-80 percent in certain minerals, making long horizon forecasts analytically unreliable. Instead of anchoring strategy on speculative price paths, the methodology emphasizes the sector's strategic resource value, its ability to enable metals, chemicals, electronics, and energy transition manufacturing, and its foundational role in NER's long term economic transformation while preserving methodological rigor.

Key Sectoral Calculations and Methodology

i. FY48 projected turnover: Global, India and NER:

The projected sectoral turnover for the NER in FY48 is derived through a structured, top-down macro-to-micro allocation framework to ensure realism, strategic alignment, and global competitiveness. First, the global turnover of each sector in FY48 is estimated using forward-looking market projections based on credible industry research and long-term compound annual growth rates (CAGR). This ensures that the projections are anchored in global demand trajectories rather than static domestic assumptions. Second, India's target share of global turnover is determined based on its strategic economic ambition, competitive advantages, policy direction, and evolving industrial capacity. This step reflects what India should reasonably aspire to capture in the global value chain by FY48. Third, the NER's share is derived as a proportion of India's target, based on:

- Regional competitive advantages (geography, resources, connectivity, demographics)
- Policy prioritization
- Sectoral feasibility and cluster potential
- Expected improvements in infrastructure and logistics

This cascading allocation method ensures:

- Alignment with global market realities
- Integration of NER within India's broader economic strategy
- Quantified and measurable long-term targets
- A realistic pathway for NER to emerge as a competitive production and export hub

Thus, the FY47 turnover target for NER is not aspirational in isolation but embedded within global market growth and national strategic positioning.

ii. FY26 as-is required investment

The required investment to achieve the FY48 turnover targets is derived using a capital investment ratio framework, ensuring financial feasibility, capital discipline, and macroeconomic realism. For each sector, the capital-output ratio (or investment-to-turnover ratio) is estimated based on:

- Industry benchmarks
- Historical capital intensity
- Global best practices
- Technology, infrastructure, and logistics requirements
- Sector-specific asset composition (fixed vs working capital intensity)

Using these ratios, the present value (PV) of capital investment required to achieve the FY47 turnover target is calculated. This incorporates:

- Phased capital deployment over the build-out period
- Time value of money
- Long gestation periods for infrastructure-heavy sectors
- Financing structure assumptions (equity-debt mix)
- A long-term inflation assumption of 5% to ensure projections are stated in realistic nominal terms and reflect cost escalation over the planning horizon

This methodology ensures that:

- Investment estimates are economically grounded and while aspirational are not overly speculative or irrational
- Capital planning is directly linked to output targets
- Funding gaps can be clearly identified
- Public and private capital roles can be strategically designed
- Financial instruments (PPP models, viability gap funding, blended finance, development finance participation) can be calibrated appropriately

By explicitly incorporating capital intensity, time value adjustments, and inflation assumptions, the framework moves beyond high-level turnover projections and provides a credible, inflation-adjusted, investment-backed development roadmap for FY47.



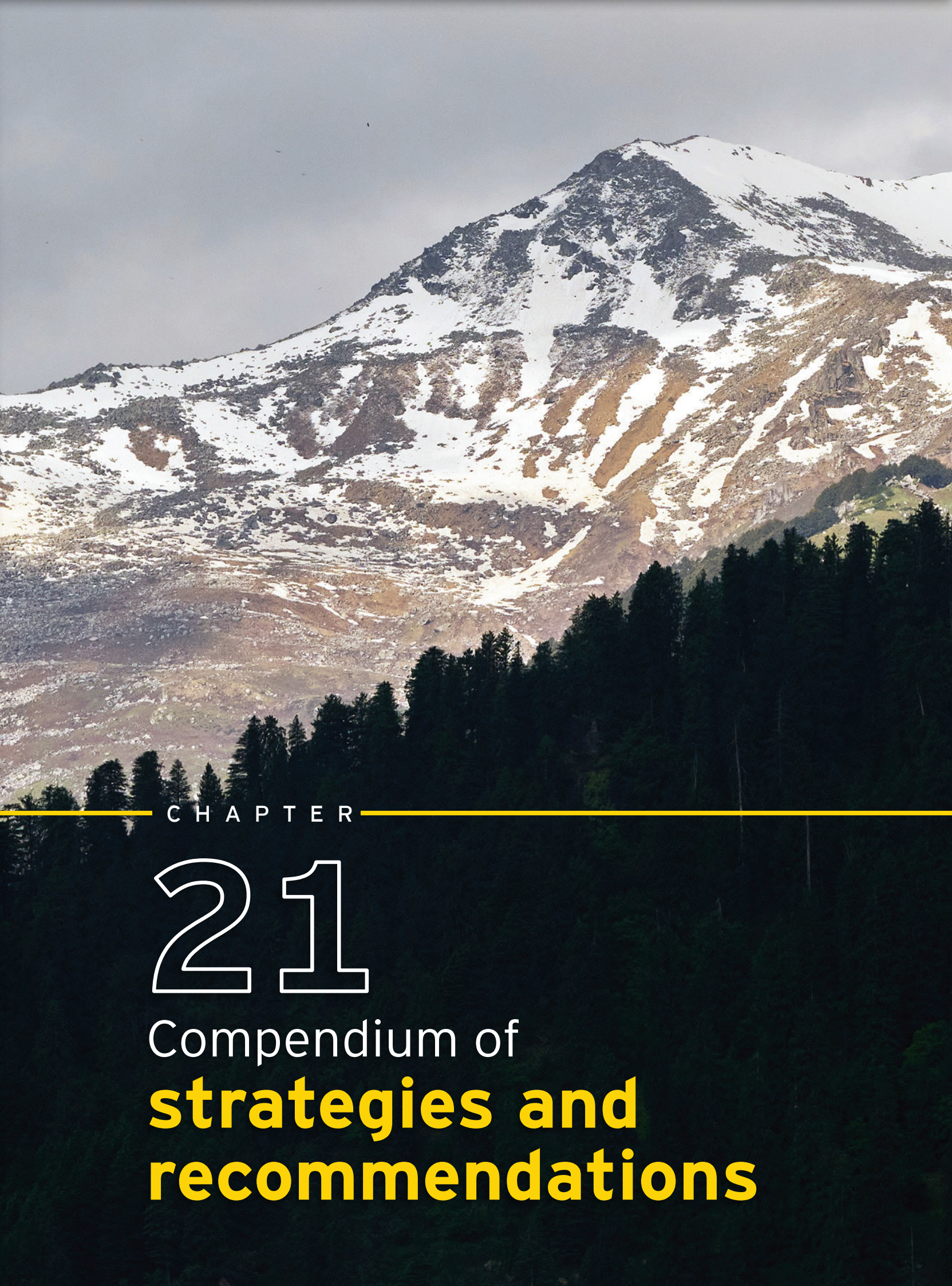
20.4 Framework for identifying state-level priorities

The selection of the top ten priority areas for each state follows a structured process that brings together stakeholder insights, sector diagnostics, and regional strategy considerations. Consultations conducted under the NE Vision Plan 2047 provided detailed state-level inputs on strengths, sectoral aspirations, and capability gaps. These inputs establish the qualitative base on which the rest of the analysis is built.

Integration of Evidence from Institutional and Sectoral Sources: The qualitative findings were cross validated with evidence from MDoNER High Level Task Force reports, the North Eastern Economic Corridor analysis, and other sectoral studies. These sources help confirm competitive advantages, identify

constraints, and highlight opportunities for inter state collaboration. This combined evidence ensures that priority-setting is grounded in both local perspectives and broader economic patterns.

Regional Sequencing and Alignment with Shared Advantage Sectors: Priority areas are then sequenced using a regional lens to balance each state's unique capabilities with NER wide integration goals. The methodology ensures that individual state strengths align with shared advantage sectors and cross state value chains, enabling complementary development rather than fragmented initiatives. This approach embeds state choices within a coherent regional framework while fully preserving state autonomy in decision-making.

A photograph of a snow-capped mountain peak with a dense forest in the foreground. The mountain is covered in patches of snow and brownish vegetation. The foreground is a dark, dense forest of evergreen trees.

CHAPTER

21

Compendium of
**strategies and
recommendations**



This document is intended as a joint vision for a region of the Republic of India that is comprised of eight states that are each sovereign by themselves. The effort has been to help define a destination and common purpose without being prescriptive or trying to chart out a specific path for each state. Instead, the report focuses on competitive advantages and highlights initiatives and sectors where constituent states could join forces to attain critical mass to make the region nationally and globally more competitive through enhancing capacities and improving economies of scope and scale.

Strategies and recommendations included in this chapter are a condensed compendium of those provided in context through the rest of the document. They are generally intended to provide reasonable paths amongst a plethora of possible options and solutions to attain the envisaged vision. These are not intended to be comprehensive, collectively exhaustive, or even the only methods to achieve the desired goals – merely possibilities that make the future goals attainable/plausible. It is recommended to follow this vision exercise with a strategy exercise that can translate the vision into a strategy and subsequently into a roadmap or action plan.

21.1 Chapter 1: Understanding Viksit Bharat and Viksit NER

1. **Drive Productivity-Led, Value-Added Growth in Agriculture:** Shift from acreage expansion to higher per hectare productivity, improved quality, and stronger value capture through scientific farming, diversified crops, and integrated value-chain development.
2. **Build Integrated Agri-Value Chains and Market Systems:** Develop processing capacity near production zones, expand cold-chain and logistics networks, strengthen certification systems (organic, GI), support Farmer Producer Organisations (FPOs), and promote border-based collection and processing hubs to enable value-added trade.
3. **Strengthen Manufacturing Competitiveness:** Address deterrents such as high logistics costs, unreliable power, limited credit, and skills gaps by upgrading industrial infrastructure, streamlining land and regulatory processes, and targeting sectors with natural or emerging competitive advantages.
4. **Expand Private Investment and Reduce Operational Risk:** Increase private-sector participation across agriculture, manufacturing, and services by improving ease of doing business, ensuring reliable digital and physical infrastructure, and derisking private operations with greater policy and regulatory certainty.
5. **Grow Services Through Urbanisation, Connectivity, and Tourism:** Leverage urbanisation-led market creation, digital connectivity, improved financial access, and tourism potential to expand high-productivity private services and diversify the regional economy.
6. **Develop Scalable, Livable Urban Centres:** Focus investment on a limited number of cities and town clusters to build economic density, anchor high-quality employment, attract and retain skilled workers, and reverse out-migration through better housing, services, and digital infrastructure while ensuring urban centres attain critical mass.
7. **Enable Agglomeration Effects Through High-Quality Connectivity:** Enhance multimodal connectivity—eastward, cross-border, and intra-regional—including high-frequency rail links between smaller agglomerations to simulate larger market integration.
8. **Adopt Spatially Targeted, Sequenced Development:** Sequence development by first raising agricultural productivity and value addition, building and processing manufacturing scale, and finally enabling services expansion. Apply spatial targeting along priority corridors, industrial hubs, and selected urban centres to attract private capital and catalyse job creation in increasing competitive notes.
9. **Align Development with Ecological and Social Realities:** Design development pathways that respect the region's high forest cover, fragile ecosystems, and customary land-tenure systems—focusing on compact urban forms, sustainable forest-based value addition, eco-tourism, and green manufacturing.



21.2 Chapter 2: NE Vision Plan 2047

1. **Pursue High, Sustained Growth Through Structural Transformation:** Target real GSDP growth of 11.8-17.5% across NER states by shifting the economy from subsistence agriculture toward higher value manufacturing and modern services.
2. **Build Competitive Non Farm Sectors Anchored in NER Strengths:** Develop food processing, logistics, digital services, tourism, handicrafts, textiles, and clean energy as key engines of diversification and upward mobility.
3. **Strengthen Fiscal Sustainability by Crowding In Private Investment:** Expand states' own revenue bases and mobilize private capital through improved regulatory frameworks, risk mitigation tools, and PPP models that enhance efficiency and relieve fiscal pressure.
4. **Develop High Quality, Context Responsive Urban Centres:** Build globally competitive yet locally rooted cities that provide livability, productivity, and cultural and ecological harmony, forming the foundation for long term growth and talent retention.
5. **Convert Renewable Energy Potential into Scaled, Modern Infrastructure:** Rapidly expand renewable energy capacity using best in class technologies supported by targeted policies and strategic investments.
6. **Prioritize Rail Led Connectivity for Efficiency and Sustainability:** Shift emphasis from road-heavy expansion to rail centric development, given rail's lower land use, reduced ecological impact, and significantly lower carbon footprint and freight costs.
7. **Build Integrated Logistics and Cold-Chain Ecosystems:** Invest in logistics parks, warehousing, and cold chain infrastructure—co located with major corridors—to reduce post harvest losses, expand market access, and attract food processing and light industry.
8. **Mobilize Infrastructure Capital Through Balanced Centre-State-Private Participation:** Use guarantees, blended finance, and incentive schemes to attract private operators across logistics, cold storage, waste management, water services, and renewable energy.
9. **Operationalize the “15 Advantage Sectors” Framework:** Enable each state to focus on at least six competitive sectors to deepen specialization, create cross state clusters, and build integrated value chains.
10. **Foster Sectoral Synergies for a Self Reinforcing Growth System:** Integrate tourism with food and handicrafts, connect digital services to broader market access, and scale processing industries to stabilize agricultural incomes.
11. **Organize Development Around Three Accelerators:** Infrastructure, Urbanization, and Advantage Sectors: Use infrastructure to enable markets, urbanization to amplify productivity, and targeted sectoral investments to anchor competitiveness—creating a virtuous cycle that draws in private investment.
12. **Adopt a Front Loaded Infrastructure Investment Strategy (Scenario 1):** Commit to raising infrastructure investment to ~10% of GDP in FY25-35 to close capacity gaps and drive industrialization, then moderate to ~7.5% from FY36-47 as networks mature.
13. **Recognize Infrastructure as the Catalyst for Transformation—not a Cost:** Scenario 1's long gestation, front loaded approach expands cumulative investment to INR 132.4 lakh crore by FY47 (62% above Business as Usual (BaU)), unlocking network effects and agglomeration benefits aligned with successful East Asian development trajectories.

21.3 Chapter 3: Cross-sectoral strategies for NER

1. **Adopt multi state sectoral prioritisation with GoI as convener-aggregator-accelerator**, using neutral platforms for inter state coordination, pooled demand for shared services, and catalytic co investment and risk mitigation instruments to accelerate early stage value chains.
2. **Make enterprise competitiveness the central growth engine** enable firms to move up, down, and across value chains, access premium markets, strengthen management capability, and build a visible base of commercially viable enterprises that drive jobs, exports, rising wages, and tax buoyancy.
3. **Develop dense sectoral clusters to unlock agglomeration economies**, co locating suppliers, processors, logistics providers, and support services to share infrastructure, reduce transaction costs, shorten lead times, and enable just in time operations.
4. **Build talent and knowledge ecosystems around clusters**, deepening labour market pooling, enabling cross firm mobility, accelerating technology diffusion, and strengthening sector specific skilling aligned to enterprise needs.
5. **Prioritise high frequency, reliable, and affordable multimodal connectivity**; road, rail, aviation, inland waterways—guided by three principles: predictable schedules, frequencies enabling same day cycles, and pricing structures viable for firms and workers.
6. **Concentrate resources in priority growth nodes**, selected on economic base, connectivity potential, resource endowments, and *cross border opportunities*, creating demonstrable outcomes that attract further public and private investment.
7. **Adopt a spatially differentiated dual value addition model** – localise *primary processing* near production clusters and concentrate secondary/tertiary processing in well connected urban hubs, *aggregating output from multi state rural clusters*.
8. **Tailor infrastructure and incentives to node function**, providing rural consolidation points with scaled utilities, access roads, and modest processing equipment, while equipping urban industrial hubs with advanced utilities, finance, testing, logistics, and multimodal connectivity supported by differentiated incentives.
9. **Use rural value addition to drive inclusion and reduce distress migration**, generating local employment, improving income distribution, strengthening rural viability, and enhancing producer margins through early stage processing.
10. **Apply a systems approach to cross sector synergies and sequencing**, prioritising *high spillover sectors (emphasising spillover potential over direct value add)*, and sequencing enabling investments—power, connectivity, workforce development—early to unlock downstream scaling.
11. **Synchronise interventions and protect strategic assets through full gestation**, coordinating complementary prerequisites to maximise systemic returns, and sustaining policy and financial support until scale thresholds and self reinforcing growth dynamics emerge.
12. **Exploit tourism-renewable energy synergies and low carbon competitiveness**, aligning energy infrastructure with tourism needs and leveraging clean energy credentials—particularly hydro and renewables—to meet increasingly stringent low carbon standards in global supply chains.
13. **Transform the investment climate through rule based, time bound approvals**, using empowered single window mechanisms with coordination authority, deemed approvals, rule based compliance regimes, and public dashboards that enhance transparency and reduce transaction costs.
14. **Guarantee zone level service reliability and catalyse private entry**, through service level agreements (with compensation for failure), robust investor grievance redressal and ombudsman systems, and catalytic Public-Private Partnerships (PPPs), viability gap funding, and targeted, time bound incentives to demonstrate viability and crowd in capital.
15. **Build a regional brand with strong quality assurance systems**, including certification, traceability, Geographical Indication (GI) protection, and clear participation standards overseen by independent bodies. Support the brand with pooled marketing and inclusive access for Micro, Small and Medium Enterprises (MSMEs), artisans, cooperatives, and producer groups—backed by technical assistance and awareness efforts and roll it out first in organic foods, eco-tourism, handloom and handicrafts, Ayurveda, Yoga & Naturopathy, Unani, Siddha and Homeopathy (AYUSH)/wellness, and GI-eligible crops.



21.4 Chapter 4: Northeast India: The regional advantage mix

1. **Position the Northeast as a strategic pillar of national stability and regional diplomacy:** Link inclusive economic development, border area connectivity, and livelihood expansion to improved frontier management, while leveraging the region's trans boundary cultural linkages to strengthen India's soft diplomacy and regional engagement.
2. **Harness physical and digital connectivity to unlock NER's geographic advantage:** Improve the speed, reliability, and integration of movement within the region and with the Indian mainland, enabling seamless flow of people, goods, and services.
3. **Develop a networked aviation ecosystem as part of a multimodal transport system:** Treat airports as interconnected nodes supported by strong surface connectivity, and align aviation planning with cargo flows, emerging urban centers, and cross border corridors to stabilize utilization and ensure commercial sustainability.
4. **Leverage the region's natural capital to drive a green growth development pathway:** Promote eco tourism, bio pharmaceutical research, sustainable forestry and fisheries, and large scale clean energy generation to contribute simultaneously to regional prosperity and national climate objectives.
5. **Integrate indigenous knowledge and human capital into innovation led development:** Establish centers of excellence that combine traditional knowledge with modern science to advance phytomedicine, sustainable materials, climate responsive architecture, and other bio resource based innovations.
6. **Use demographic and cultural strengths to reinforce NER's regional advantage mix:** Channel the region's young population, cultural assets, and heritage knowledge into sectors with strong cross border relevance, reinforcing NER's role as India's economic and cultural bridge to neighboring countries.

21.5 Chapter 5: Regional value chains: Pathways to competitive integration

1. **Bamboo:** Strengthen scientific clump management and nursery systems; establish quality standards for treated and engineered bamboo; operationalize industrial parks in Assam and Arunachal Pradesh; expand community level treatment and common facility centers across hill states; develop regional value chain coordination with cross border market linkages (Bangladesh, Association of Southeast Asian Nations (ASEAN)); and build design, branding, and market access capabilities for artisan clusters while attracting private investment into furniture, cutlery, boards, prefab housing, fiber, and textiles.
2. **Rubber:** Renew ageing plantations and scale high yield clones; expand processing clusters in Assam; operationalize the Nagaland Special Economic Zone (SEZ) as an export hub; develop latex foam and specialty processing clusters; strengthen nurseries, farmer training, regional testing and certification; improve multimodal logistics; and attract anchors for tertiary manufacturing such as medical gloves, Commercial Vehicle (CV) tires, and consumer rubber goods.
3. **Pineapple:** Build pack houses, pre cooling, and refrigerated logistics; scale Tripura's processing clusters with air cargo links; develop GI led branding and Ready To Eat (RTE) product lines; promote organic Queen pineapple clusters tied to tourism; support juice units and farmer-group organization in smaller states; and establish aggregation networks and certification systems for premium/export markets. Create processing for byproducts like leaf fiber.
4. **Tea:** Reform auctions and expand direct trade and digital access for small growers; modernize Tripura estates and strengthen organic certification; develop Nagaland's high altitude specialty teas and Farmer Producer Organisations (FPO) based processing; expand tertiary manufacturing (blends, bags, Ready To Drink (RTD)); integrate small tea growers via mini factories; and invest in Kombucha, climate resilient Research and Development (R&D), varietal development, and extension.
5. **Rice:** Develop FPO-led procurement and drying nodes; modernize mills and parboiling capacity in Assam and Tripura; establish GI and premium aromatic rice clusters; expand mechanization through custom-hiring centers; support value-added products (fortified rice, poha, flour); and create cross border market access platforms for



surplus districts. Create value for byproducts like hash and straw.

6. **Spices:** Expand solar drying, slicing, and curing facilities; strengthen GI based branding for Lakadong turmeric and large cardamom; build FPO-led processing and packaging units; enable SEZ-linked extraction units; modernize nurseries and planting material supply; and create export linkages through consolidation platforms and testing labs.
7. **Kiwi:** Develop pack houses, cold storage, and reefer supply chains from Arunachal to metro markets; create FPO clusters with village-level pre cooling and sorting; build nurseries and orchard training programs in emerging states; support small-scale pulp/drying units; and promote GI and organic certification for premium domestic positioning.
8. **Fisheries:** Establish modern processing facilities; build temperature controlled supply chains and cold storage; develop hatcheries for indigenous species and R&D centers for disease management; expand pack houses, ice plants, and cold-chain infrastructure (Assam, Tripura priority); enable FPO managed beel/pond clusters; strengthen seed systems (Pradhan Mantri Matsya Sampada Yojana (PMMSY)); promote filleting/freezing units; build organic cold water species branding in Sikkim; and strengthen climate resilient practices in flood prone fisheries.
9. **Textiles & Handloom:** Scale Eri/Muga spinning and powerloom parks; replicate design and training institutes (Integrated Textile Tourism Centre (ITTC)); modernize artisan clusters and strengthen yarn supply; support GI-based branding and tourism-linked textile platforms; and expand e commerce channels and cooperative marketing for handloom livelihoods.
10. **Pharmaceuticals and Biotech:** Expand formulation parks and SEZ-linked export nodes; scale API manufacturing and quality-testing labs in Assam; support phytopharma Farmer Producer Company (FPCs) and incubators; strengthen biotech commercialization; and establish Good Manufacturing Practices (GMP) linked skilling and workforce pipelines.
11. **Food Processing:** Build an integrated Primary Processing Chain and Central Processing Chain (PPC-CPC) chain from farmgate to state hubs; expand cold chain and pack house networks; develop branding, packaging, and certification labs; promote specialized processing for kiwi, orange, bamboo shoots, and GI organic products; strengthen Pradhan Mantri Formalisation of Micro Food Processing Enterprises Scheme (PMFME-FPO)

capacity with shared machinery and Business Development Services (BDS); and enable cluster-level e commerce and premium retail linkages.

12. High-Mix Manufacturing:

- a. Operationalize Assembly, Integration & Testing (AIT) and Maintenance, Repair & Overhaul (MRO) infrastructure; activate Nagaland/Tripura SEZs with Electronics Manufacturing Services (EMS) anchors and Computer Numerical Control (CNC)-enabled workforces; create Industrial Training Institutes (ITI) to industry apprenticeships and Original Equipment Manufacturer (OEM) vendor development; build regional certification/testing labs; develop Technology, Semiconductor & Advanced Tech (TSAT) supply-chain ecosystems (Printed Circuit Boards (PCBs)), substrates, chemicals, packaging);
 - b. Adopt Assam hub-Tripura/Nagaland spoke models for assembly and furniture finishing; establish high fashion zones with design schools and e commerce export hubs; promote CNC/precision tooling training; strengthen multimodal freight for bulky goods; and position the region as a chip device design manufacturing ecosystem.
13. **Digital & IT Hubs:** Scale Assam Startup-The Nest with investor pipelines; activate Tripura's IT parks and data center ecosystem; complete last mile BharatNet; run digital skills missions for women and youth; and connect NER startups to national markets through VC/industry procurement programs.
 14. **Tourism:** Strengthen airport, rail, and road connectivity and anchor high quality resorts; develop homestay clusters and internal roads in hill states; improve festival infrastructure and security coordination; scale heritage restoration and digital booking platforms; and build tourism-linked value chains (food, crafts, guides) to increase community income capture. Prioritize Meetings, Incentives, Conferences and Exhibitions (MICE) and hotel infrastructure in largest agglomerations. Extend proposed high-speed rail from Siliguri to Guwahati.
 15. **Minerals and Clean Industry:** Modernize mining with strong environmental safeguards and develop controlled limestone-coal-chemical clusters; fast-track critical-mineral exploration and auctions; build road-rail-multimodal evacuation systems; create regulatory, monitoring, and community benefit sharing mechanisms; and support gas-based light industries and clean construction material clusters.



21.6 Chapter 6: Borders as opportunity: A development framework for India's NE Borders

1. **Prioritize designated border villages as strategic assets**, applying tailored approaches for high altitude, riverine, and forested regions that reflect their unique geographic, ecological, and socio cultural contexts rather than uniform planning models.
2. **Coordinate inter state border zone development** to improve regional connectivity and resource mobilization, ensuring administrative boundaries do not impede economic integration or shared infrastructure.
3. **Leverage cultural diversity and traditional livelihoods for sustainable economic development**, especially through eco tourism and cultural tourism anchored in indigenous knowledge and heritage.
4. **Adapt development approaches to tribal and customary governance systems**, enabling economic integration while reinforcing long term border stability, social cohesion, and security objectives.
5. **Integrate the economic potential of border areas into regional growth strategies**, including eco tourism, cross border trade, and sustainable natural resource management.
6. **Differentiate infrastructure and services based on local conditions**, tailoring interventions to distinct geographic, ecological, and economic profiles to unlock village specific development potential.
7. **Strengthen community-government coordination and border management systems**, creating stable conditions for formal economic activity and responsible private sector participation in sparsely populated, institutionally evolving regions.
8. **Address climate vulnerability through integrated resilience strategies**, combining climate smart agriculture, livelihood diversification, and ecosystem based watershed and natural resource management.
9. **Deploy targeted, terrain specific infrastructure, including:**
 - a. High altitude connectivity for horticulture cold chains and adventure tourism
 - b. Riverine infrastructure for agricultural and fisheries market integration
 - c. Forest region connectivity for sustainable timber and Non Timber Forest Produce (NTFP) value chains
10. **Strengthen institutional presence in border villages** by expanding permanent civil administration, policing, and judicial access to reduce transaction costs, improve contract enforcement, and enable private investment in agro processing, tourism, hospitality, and retail.
11. **Institutionalize community-security coordination** through empowered Border Area Development Committees with clear resource allocation mandates, enabling local communities to participate in priority setting, coordination, dispute resolution, and regulated cross border economic activity.
12. **Support long term stability and development through sustained political and fiscal commitment**, stronger inter agency coordination, community centric implementation models, and programmatic continuity aligned with Viksit Bharat @2047.
13. **Conduct a comprehensive village level gap analysis across all border villages**, jointly with State Governments and local institutions, to establish a shared diagnostic baseline, assess gaps against "Enhanced Living" standards, and develop a phased, data driven roadmap for prioritized interventions.

21.7 Chapter 7: Urbanization as a growth driver

1. **Treat urbanization as a deliberate economic strategy, not a passive outcome:** Use planned urban expansion to drive regional integration, productivity, social mobility, and access to education, healthcare, housing, and cultural opportunities.
2. **Position cities as NER's primary engines of long-term transformation:** Anchor growth in strong urban nodes capable of concentrating talent, capital, and high productivity activities, generating spillovers to surrounding rural regions.
3. **Develop an integrated urban system anchored in medium-sized cities:** Build networks of interconnected cities—rather than a single dominant centre—functioning as unified metropolitan economies through high-capacity regional transport.
4. **Strengthen high-frequency rail and multimodal connectivity across the region:** Use rail-led regional mobility, multimodal transport planning, and polycentric spatial structures to reduce the constraints of geographic dispersion and enable unified labour and firm markets.
5. **Plan cities as corridor-linked clusters rather than isolated settlements:** Develop high-capacity inter-city connections (rail, roads, digital) that allow multiple cities to share scale advantages—agglomeration, markets, specialisation—without recreating large-city congestion.
6. **Adapt proven global models—Tokyo, Germany, San Francisco Bay Area—to NER's context:** Combine regional transit with concentrated employment hubs, high-density mixed-use development, and integrated surrounding cities to build critical mass despite topographical and demographic constraints.
7. **Apply Dubai-style front-loaded infrastructure investment:** Use early, sustained investments, especially in connectivity and logistics to diversify the economy, crowd in private capital, and strengthen NER's integration with national and global markets.
8. **Treat early infrastructure choices as path-defining strategic decisions:** Recognize that urban form, industry mix, and long-term livability depend heavily on foundational investments made now, shaping what future economic activities cities can support.
9. **Anchor the urban strategy in the principles of connectivity, concentration, and coordination:** Focus growth on integrated city systems, strengthened anchor hubs, and coordinated inter-jurisdictional planning to achieve scale and avoid fragmented development.
10. **Pursue a deliberate shift toward higher urbanization targeting ~55% by 2047:** Use Mizoram and Goa as benchmarks; focus on achieving regionwide agglomeration thresholds necessary for structural transformation.
11. **Prioritize million-plus cities and selectively develop a regional megacity:** Support high-potential cities to reach critical mass and develop one megacity; potentially Guwahati as the region's primary anchor, complemented by other million-plus centres.
12. **Implement a sequenced, milestone-based investment framework across three phases:**
 - I. **Phase 1:** foundational infrastructure and institutional capacity
 - II. **Phase 2:** city expansion, connectivity, power and digital upgrades
 - III. **Phase 3:** mature urban systems delivering 3x-5x economic multipliers and strong consumption driven growth
13. **Strengthen scalable urban nodes while avoiding excessive dispersion of investment:** Concentrate resources on cities with potential for density, productivity, and industry clustering rather than spreading investments thinly across many small towns.
14. **Promote compact, high-density, ecologically aligned urban growth:** Avoid horizontal sprawl into forested and fragile areas; align development with customary land tenure systems and cultural contexts; use conservation aligned, mixed use land use frameworks suited to hilly terrains.
15. **Plan industrial and economic clusters deliberately within urban agglomerations:** Concentrate complementary industries with shared logistics, testing, utilities, and business services; use cluster-based design to deepen labour pooling, improve supply-chain efficiency, and accelerate innovation.



21.8 Chapter 8: Increasing efficiency and integration across the Northeast

1. **Shift from asset addition to asset integration and utilization:** Prioritize targeted investments and policy reforms that knit together existing and planned logistics assets—reducing fragmentation, freight costs, and system inefficiencies—over standalone infrastructure expansion.
2. **Diversify corridors beyond the Siliguri chokepoint with multimodal redundancy:** Accelerate complementary rail-road-IWT-air routes to lower concentration risk and improve supply chain reliability and resilience. Extend proposed high-speed rail from Siliguri to Guwahati.
3. **Modernize and extend rail for freight competitiveness:** Complete gauge conversion, add sidings, and connect industrial clusters and border nodes to shift bulk and long haul cargo to lower cost rail.
4. **Operationalize inland waterways as cost effective freight corridors:** Ensure assured depth dredging, protocol terminals, and physical co location with rail sidings and national highways—especially on National Waterway 2 (NW 2) to move bulk commodities at scale.
5. **Build regional cold chain ecosystems at scale:** Develop Multimodal Logistics Parks (MMLPs) with grade A temperature controlled warehousing via Public-Private Partnerships and Viability Gap Funding (PPPs + VGF); expand end to end systems (pre-cooling, reefer transport, multi temperature warehousing) focused on high value horticulture and organic foods.
6. **Modernize border trade infrastructure and processes:** Develop integrated Integrated Check Posts and Land Customs Stations (ICPs/LCSS) with digital clearances, warehousing, testing; expand Authorised Economic Operator (AEO) participation; deploy single window, simultaneous inspections; and enable cross border digital data exchange with the ASEAN Single Window.
7. **Stand up a unified digital logistics stack for NER:** Create an integrated digital freight layer (route optimization, cargo matching, transparent pricing), extend Unified Logistics Interface Platform (ULIP) to LCS/ICDs/nodes, launch a Northeast Business Gateway front end, enable blockchain verified approvals across states, automate GST Input Tax Credit (GST ITC) reconciliation, and build a regional data mesh with forecasting and real time governance dashboards.
8. **Integrate weather/climate intelligence and secure the digital backbone:** Link weather/climate data to crop advisory systems via Application Programming Interfaces (APIs) to reduce losses and establish a 24x7 NER Cybersecurity Operations Centre to protect shared digital infrastructure.
9. **Institutionalize regional logistics governance and cooperation:** Create a NER Logistics Corporation to aggregate demand and run common-user facilities; build a regional logistics/mobility platform (aligned with Ministry of Development of North Eastern Region - High-Level Task Force (MDoNER HLTF)); strengthen NEC with a technical secretariat and periodic rotation of responsibilities ensuring balanced member states participation; establish a regional standards body; adopt statewide logistics performance targets; and operationalize cooperation through a NER Cooperation Fund, variable participation, and transparent benefit-sharing.
10. **Modernize public service delivery via e KYC and co design:** Use Electronic Know Your Customer (e KYC) to streamline onboarding (banking / Non-Banking Financial Company (NBFC), MSME formalization, welfare targeting with alternate IDs for vulnerable groups) while co designing state wise rollouts that respect tribal governance and readiness, demonstrating value before scaling over 5-7 years.
11. **Enable efficient labor markets across states:** Adopt mutual recognition of vocational qualifications (Sector Skill Councils), create a regional job matching platform tuned to NER languages/sector/geography, and fast track early win cooperation (reciprocal professional credentials, multi state tourism operator licensing, common NER Organic Brand with mutual certification).
12. **Balance supply and demand side logistics interventions to raise throughput:** Pair supply side nodes (MMLPs, climate resilient roads, rail, IWT) with demand side engines (agro processing zones, Uttar Poorva Transformative Industrialization Scheme (UNNATI) 2024

incentives, formalized bamboo chains) to address structural freight imbalances and lift corridor level volumes.

13. **Upgrade sector specific logistics quality systems:** Provide VGF for cold chains in horticulture clusters with anchor offtake; deploy compliant transport and continuous monitoring for pharma (ASEAN ready); build National Accreditation Board for Testing and Calibration Laboratories (NABL) accredited labs in each state capital (food, textiles, electronics, construction materials); and harmonize product standards to international protocols for single production systems.
14. **Secure predictable Operations and Maintenance (O&M) financing for infrastructure:** Establish

dedicated, ring fenced maintenance funds for roads, power, and water using earmarked revenue streams (e.g., fuel cess, vehicle registration), with statutory allocations to safeguard reliability beyond annual budget cycles.

15. **Build a mission oriented innovation and commercialization ecosystem:** Focus public innovation capacity on NER advantages (organic agri & processing, hydro/RE integration, herbal pharma, bamboo & forest industries, digital delivery); crowd in capital via Northeast venture funds and partial credit guarantees; and connect the ecosystem through a NER Innovation Network, shared knowledge platform, regular open access briefs, and cross border Research & Innovation (R&I) collaborations for market access and tech transfer.

21.9 Chapter 9: Human resource development and employment

1. **Establish an integrated human capital and employment architecture:** Adopt a unified framework that aligns education quality, skills development, enterprise incentives, labour mobility, and migration management as interlinked drivers of long-term transformation. This approach replaces siloed programmes with coordinated interventions that jointly raise productivity, job quality, and income growth across NER.
2. **Align education and skills systems directly with employment pathways:** Reorient curricula, vocational training, and certification systems toward labour market needs by embedding market-relevant skills, employability outcomes, and work-based learning into education. Anchor reforms in employer feedback, industry-recognized credentials, and sector-led training to strengthen job matching, retention, and wage progression.
3. **Re target human capital investments toward outcomes, not inputs:** Shift from participation metrics to measurable learning outcomes, retention, progression, and labour-market relevance. Prioritise teacher effectiveness, institutional quality, competency-based learning, and digital access to ensure education systems translate directly into productivity and employment readiness.
4. **Adopt differentiated, district level human capital pathways:** Implement state- and district specific strategies that reflect differences in economic

structure, workforce capabilities, connectivity, and sectoral potential. Provide targeted support to lagging districts to strengthen education-to-employment transitions and reduce emerging intra-regional disparities.

5. **Address mid skill and supervisory talent gaps critical for enterprise growth:** Expand demand-driven skill development for technicians, supervisors, and mid-skill roles that constrain enterprise productivity in NER. Sector-specific programmes aligned with employer requirements in manufacturing, services, agro value chains, and logistics can raise workforce quality and youth employability.
6. **Focus skills and employment policies on priority sectors with high absorption potential:** Channel human capital investments into sectors where skills development unlocks enterprise scaling and job creation—healthcare, digital services, education, logistics, agro-processing, and knowledge-intensive professional services. Position services as the primary employment engine given structural limits on large-scale manufacturing.
7. **Strengthen healthcare as both an employer and a productivity enabler:** Expand training pipelines for nurses, paramedics, and technicians and scale telemedicine, diagnostics, and digital health delivery in underserved districts. Align workforce development with institutional strengthening to improve health outcomes, service competitiveness, and quality employment.



8. **Build an entrepreneurship-led employment ecosystem:** Develop incubators, mentorship networks, digital infrastructure, seed funding, and cooperative market access to scale entrepreneurship as a core employment model. This supports geographically distributed job creation, greater formalization, women's participation, and local supply-chain development.
9. **Treat migration management as a strategic economic tool:** Integrate migration into long-term economic planning as a means of optimizing human capital rather than responding to distress. Expand quality education to reduce education-driven outmigration, align mobility with regional labour absorption, and ensure migration contributes to productivity and income stability.
10. **Enable structured return, reintegration, and skill portability:** Support returning migrants through recognition of prior learning, portable certifications, enterprise support, and job matching systems that align local demand with external experience. Strengthen adoption of National Skills Qualifications Framework (NSQF) and interoperable skill systems to facilitate outward mobility and reintegration as industries expand.
11. **Upgrade skills for manufacturing and resource-based value chains:** Strengthen productivity and scaling in manufacturing clusters by aligning skilling initiatives with agro-processing, bamboo, pharmaceuticals, and other resource-based sectors. Expand technical training, technology adoption support, and value chain integration to progress from basic processing to higher value manufacturing.
12. **Position enterprise-led employment as the primary absorption mechanism:** Align employment strategy with the reality that long-term job creation depends on enterprise productivity, scaling, and formalization. Improve infrastructure, regulatory clarity, finance, and market linkages to create conditions where firms invest in workforce development and sustain high-quality employment.
13. **Strengthen foundational learning as the long-term driver of workforce quality:** Place literacy, numeracy, and cognitive skills at the core of human capital strategy, supported by teacher training, learning assessments, and institutional accountability. Strong foundational learning is essential for long-term productivity and reducing skill gaps in later years.
14. **Align higher education with regional priority sectors and labour markets:** Refocus secondary and tertiary programmes on applied learning, career pathways, and sector relevance in tourism, healthcare, logistics, agriculture-linked chains, digital services, and education technology. Position educational institutions as regional skill anchors to reduce unnecessary outmigration.
15. **Expand digital inclusion and transition planning for non-farm employment:** Use digital platforms to deliver education, skilling, healthcare, and job-matching at scale, overcoming NER's geographic constraints. Support structured shifts from agriculture to non-farm livelihoods through expanded agro processing, logistics, marketing services, and digitally enabled employment pathways.

21.10 Chapter 10: Sustainability, environment and resilience

1. **Position NER's ecological systems as strategic national assets:** Recognize NER's forests, biodiversity, hydrology, and carbon sinks as critical to India's climate regulation, disaster risk moderation, and long-term water and ecological security. Integrate preservation of these systems into national growth planning so environmental stewardship and economic development advance together.
2. **Align regional development with conservation and sustainable natural capital use:** Embed forest, biodiversity, and ecological protection within NER's long-term development strategy, while enabling productive and sustainable use of genetic resources for agriculture, pharmaceuticals, and bio-based industries. Strengthen policy and investment frameworks that link conservation to sustained national economic value.
3. **Treat ecosystems as core economic infrastructure within planning systems:** Institutionalize ecosystem service valuation, climate risk pricing, and lifecycle cost assessments in public investment appraisal to guide fiscally efficient, resilience oriented development. This shifts planning from reactive environmental compliance to proactive protection of natural capital and long-term public asset resilience.
4. **Adopt landscape level governance and cross sectoral ecological planning:** Use Strategic Environmental Assessments for river basins and interconnected landscapes to coordinate decisions across states and sectors. Strengthen ecological monitoring and data integration by leveraging India State of Forest Report (ISFR), State Action Plans on Climate Change (SAPCCs), and national datasets to manage shared ecosystems and reduce cumulative environmental risks.
5. **Scale community led conservation models with performance linked financing:** Expand financing mechanisms that reward measurable ecological outcomes, drawing from global and regional best practices. Strengthen customary institutions and community forest governance, ensuring conservation programmes reinforce indigenous resource management systems and long-term livelihood security.
6. **Integrate biodiversity, climate adaptation, and disaster risk reduction:** Align biodiversity protection with climate adaptation and Disaster Risk Reduction (DRR) strategies to lower fiscal exposure and safeguard development gains. Prioritize ecosystem restoration, nature-based solutions, and cross sector coordination to strengthen adaptive capacity and reduce long-term vulnerability.
7. **Develop a phased, system ready pathway for renewable energy expansion:** Unlock NER's renewable potential by first strengthening transmission, storage, and grid automation; coordinating hydropower with pumped storage; aligning additions with system readiness; and ensuring distributed renewables directly support agriculture, MSMEs, logistics, and services.
8. **Build climate resilience into core development decisions:** Anchor planning in NER's high hydrological volatility, terrain fragility, and livelihood sensitivity. Prioritize climate resilient transport, energy, and urban systems that reduce vulnerability, deliver immediate economic benefits, and protect public capital stock over time.
9. **Strengthen river basin, watershed, and climate resilient agriculture systems:** Adopt integrated river basin and watershed management to manage hydrological extremes, enhance water retention, and improve resource efficiency. Target climate resilient agriculture, livelihood diversification, and natural ecosystem protection to sustain incomes and adaptive capacity.
10. **Mainstream disaster risk reduction in statutory planning and infrastructure design:** Replace response driven DRR with proactive risk informed planning for a region largely in Seismic Zones IV-V and prone to floods and landslides. Mandate hazard mapping in land use plans, resilient design standards in public infrastructure, lifecycle costing in investments, and robust but complementary relief systems.
11. **Apply differentiated, place based sustainable development strategies:** Tailor planning and service delivery to NER's geographic and economic diversity—mountainous terrain, border regions, fragile corridors, and fast urbanizing states—balancing economic viability, ecological responsibility, and fiscal efficiency. Integrate connectivity led growth with resilience and spatial planning as a unified approach.
12. **Align infrastructure, urbanization, and sectoral investment with conservation imperatives:**



Ensure that major projects incorporate environmental safeguards from the outset, particularly in border and transit corridors. Strengthen land use planning, carrying capacity assessments, and environmental management frameworks so urban growth, trade, and connectivity reinforce sustainability rather than degrade ecological assets.

13. **Integrate customary institutions and indigenous knowledge into development planning:** Treat customary bodies as implementation partners; align project design with traditional land systems; avoid standardized templates in tribal areas; and use indigenous knowledge to inform climate adaptation, resource governance, and sustainable livelihoods. Support culturally grounded value chains such as agroforestry, bamboo, handlooms, and local foods.
14. **Promote community owned cultural and eco tourism models:** Strengthen tourism pathways that safeguard cultural continuity, ensure fair representation and local ownership, and prevent over commercialization. Expand documentation, digitization, and integration of local languages, ecological knowledge, and heritage into education to preserve and transmit traditional systems.
15. **Strengthen multi-level governance, financing, and coordination for sustainability:** Operationalize coordination across Centre, states, districts, and customary institutions to embed sustainability into policy, fiscal planning, and implementation. Use green budgeting, performance linked financing, Compensatory Afforestation Fund Management and Planning Authority (CAMPA) and flood management funds, and external finance to support resilience, ecosystem based interventions, and long-term climate-compatible growth.

21.11 Chapter 11: Arunachal Pradesh

1. The **10 recommended priority areas** for Arunachal Pradesh are Tourism, Non-Timber Forest Produce (NTFP), Bamboo and Cane-based Industries, Power (Hydrogen and Renewable Energy), Rubber and Plantation Crops, Cross-Border Trade and Regional Logistics, Education and Skill Development, Forest-based Eco-services (Carbon, PES), Sustainable Infrastructure, Horticulture and High-Value Agriculture.
2. The four priority areas for the **state's integration with regional value chains** are **Kiwi, Tea, Bamboo, Minerals**.
3. **Strategic recommendations** for Arunachal Pradesh:
 - a. Prioritise mega-dam clusters over small hydro dispersion to achieve efficient basin-level power evacuation.
 - b. Advance rail alignments specifically through industrial corridors rather than creating dispersed, non-strategic lines.
 - c. Target the development of gas-based clusters near border areas over standalone oil extraction activities.
 - d. Promote sector-specific industrial clusters instead of allowing broad and inefficient spatial industrial spread.
 - e. Focus export-oriented trade nodes on Myanmar-Bhutan interfaces to maximize regional market access over domestic markets.
 - f. Emphasise the construction of strategic border roads over intra-valley links to facilitate industrial evacuation.
 - g. Drive hydropower-led industrial development to strengthen the national clean energy base and state economy.
 - h. Expand high-altitude horticulture into premium value chains supported by robust regional market links.
 - i. Advance bio-economy and natural-products industries as a primary engine for state-wide economic diversification.
 - j. Develop eco-adventure tourism as a stable and competitive services platform within the Northeast region.

21.12 Chapter 12: Assam

1. The **10 recommended priority areas** for Assam are Bamboo, Rubber, Tea and Plantation Items, Tourism and Creative Economy, Agriculture and Food Processing, Infrastructure and Connectivity (NER Value Hub), Cross-Border Trade and Regional Logistics, Sustainability and Urban Development, Education and Skills, IT-Digital and Digital Governance, Renewable Energy and Climate Resilience, Industrial Diversification (Mining, Quarrying, Pharma).
2. Position Assam as a regional hub state within the NER development strategy.
3. Prioritise investments in Assam's scale and connectivity strengths to enable aggregation benefits across NER value chains.
4. Leverage Assam's multimodal logistics ecosystem to reduce transaction and transportation costs for smaller neighbouring states.
5. Develop processing and value-addition platforms in Assam to unlock spillover market access for Nagaland, Manipur, Mizoram, and Tripura.
6. Enable and invest in catalytic hub-level infrastructure in Assam that delivers measurable cross-state economic returns.
7. **Strategic recommendations** for Assam:
 - a. Reposition the Hollongi-Itanagar-Naharlagun corridor as the primary industrial gateway by integrating reliable power, last-mile connectivity, and PPP-driven anchor investments in agro-processing.
 - b. Develop dedicated rail freight corridors and multimodal logistics to optimize the transit of bulk commodities, specifically petroleum and tea.
 - c. Scale permanent flood-mitigation infrastructure, including river training and scientific dredging, to de-risk investments and ensure year-round economic stability.
 - d. Expand canal and surface irrigation frameworks tailored to floodplain hydrology to enhance cropping intensity and stabilize agricultural yields.
 - e. Pivot from volume-centric production to high-margin branding and value-addition by establishing cluster manufacturing and auction hubs near Guwahati.
 - f. Prioritize refinery modernization and downstream petrochemical integration over upstream exploration to secure long-term revenue sustainability.
 - g. Expedite Brahmaputra basin hydroelectric projects and grid modernization to eliminate fuel dependencies and strengthen the clean energy base.
 - h. Institutionalize sector-specific skill clusters for tea, agro-processing, and resource-based industries to build a market-ready technical workforce.
 - i. Establish Guwahati as a climate-resilient urban hub through concentrated urban growth and regional service integration.
 - j. Position Assam as a premier value-addition hub of Northeast India creating a pathway to shift from primary production to high-value, export-oriented manufacturing.
 - k. Institutionalise the state as the central logistics and connectivity node for the NER.
 - l. Scale the tourism and cultural economy of the state through which it can be positioned as the anchor tourism node of the Northeast.
 - m. Drive green and sustainable industrialization reinforcing Assam as a sustainable value-addition center while preserving critical ecological assets.



21.13 Chapter 13: Manipur

1. The **10 recommended priority areas** for Manipur are Tourism, Agriculture & Food Processing, Bamboo & Forest Products, IT/ITeS & Allied Services, Power (Hydropower & Renewable Energy), Textiles & Handicrafts, Honey, Floriculture & Apiculture, Pharmaceutical, Aromatic & Minor Forest Products, Sports, Wellness & Event Economy, Water-Recycling, Water-Based & Compostable Plastics.
2. The four priority areas for the **state's integration with regional value chains** are Kiwi, Textiles, Fisheries and Rice.
3. **Strategic recommendations** for Manipur:
 - a. Balance road upgrades with rail given terrain constraints to strengthen last mile connectivity and integrate hill districts with valley markets.
 - b. Prioritize infrastructure-linked activity over land-intensive manufacturing; balance valley concentration with hill employment.
 - c. Shift from hill livelihood stabilization to productivity expansion through valley-based aggregation and processing.
 - d. Balance ecological restoration with regulated hydropower and fisheries to stabilize livelihoods and preserve lake integrity.
 - e. Focus trade facilitation at Moreh on cross-border priorities; de-emphasize domestic logistics where trade-offs exist.
 - f. Enforce fiscal consolidation through revenue surplus creation before deficit correction; align expenditure discipline with debt sustainability.
 - g. Decentralize services and economic functions to hill sub-centres rather than just expanding Imphal.
 - h. Accelerate cross-border economic corridor development at Moreh to formalize Manipur as a strategic international trade gateway.
 - i. Scale the ITeS ecosystem by deploying plug-and-play infrastructure and specialized BPO clusters for non-voice services.
 - j. Reposition renewable energy as productive infrastructure by fast-tracking micro-hydropower and distributed solar programs.
 - k. Formalize the eco-tourism sector into a high-value services economy through site-specific infrastructure at Loktak Lake and heritage circuits.
 - l. Leverage athletic heritage to drive sports excellence and wellness economy development via specialized infrastructure and retreats.
 - m. Modernize handloom value chains by aggregating artisans into producer collectives supported by common facility centers.

21.14 Chapter 14: Meghalaya

1. The **10 recommended priority areas** for Meghalaya are Tourism and Hospitality, Education, Food Processing, IT/ITes, Creative Industry, Power and Renewable Energy, Sustainable Infrastructure and Transport, Financial Services, Healthcare, Handloom and Handicrafts.
2. The four priority areas for the **state's integration with regional value chains** are Rubber, Spices, Digital/IT Hub and Pineapple.
3. **Strategic recommendations** for Meghalaya:
 - a. Direct urbanization towards trade corridors rather than dispersed highland settlements.
 - b. Advance rail freight alignments through mining districts rather than dispersed lines.
 - c. Prioritize value-added cement clusters over raw mineral exports.
 - d. Focus large hydro projects over small run-of-river dispersion for grid evacuation.
 - e. Balance export-oriented border logistics with domestic market linkages.
 - f. Promote sector-specific clusters versus broad spatial industrial parks.
 - g. Prioritize freight corridors over passenger tourism routes.



- h. Address infrastructure and connectivity constraints systematically through commercial airport programs that translate state-level policy into district-level execution.
- i. Accelerate labour and capital utilization through sector-aligned skilling, MSME credit expansion, and State- Autonomous District Council (ADC) coordination.
- j. Address binding constraints in infrastructure, seasonality, and value capture to convert tourism assets into reliable revenue streams.
- k. Implement community-based tourism models with transparent revenue-sharing structures to prevent economic leakage and maintain asset quality.
- l. Develop integrated tourism circuits linking Cherrapunji, Dawki, Mawlynnong, and Shillong.
- m. Ensure coordinated execution across transport infrastructure, sustainable carrying-capacity frameworks, and community engagement mechanisms.
- n. Implement coordinated interventions across jhum transition programs, FPO formation, processing clusters, and market-access infrastructure.
- o. Strengthen FPO formation to aggregate supply and manage quality for high-value agriculture and horticulture.
- p. Develop processing clusters to enable local value capture.
- q. Expand market-access infrastructure, including cold chains, digital platforms, and institutional procurement linkages.
- r. Move from generalized green manufacturing aspirations to sector-specific industrial strategies.
- s. Prioritize competitively priced, reliable power supply as the key determinant of industrial location.
- t. Accelerate hydropower development to enable competitive captive power for industry.
- u. Develop bamboo-processing clusters targeting export products.
- v. Promote pharmaceutical and nutraceutical processing linked to agriculture.
- w. Build light engineering capacity for renewable energy equipment manufacturing.
- x. Anchor success in sector-specific investment promotion and infrastructure that enables competitive cost structures.
- y. Establish monetization pathways, intellectual property infrastructure, and export orientation to formalize creative and cultural industries as an economic sector.
- z. Prioritize export market orientation targeting the Northeast diaspora, pan-India Over The Top (OTT) platforms, and international music markets to achieve scale.
- aa. Enable deliberate business development and distribution partnerships rather than relying on organic market discovery.
- bb. Develop incubation infrastructure and access to capital to professionalize creative enterprises and support formal employment generation.
- cc. Reposition major festivals as demand aggregators to convert episodic events into year-round creative economic activity.
- dd. Position Shillong as a tier-2 Business Process Outsourcing (BPO)/ITeS and digital content hub leveraging high literacy, English proficiency, expanding MeghNet connectivity, and cost arbitrage.
- ee. Ensure export orientation so sector growth is not constrained by limited local demand.
- ff. Establish digital services infrastructure, including co-working spaces and training centers.
- gg. Attract anchor clients through targeted investment promotion to drive scale and credibility.
- hh. Develop sector-specific training programs aligned with employer demand to support workforce readiness.



21.15 Chapter 15: Mizoram

1. The **10 recommended priority areas** for Mizoram are Bamboo Bioeconomy, Food Processing and Agri-Business Park, Tourism, High-Value Horticultural Produce, Handloom, Handicrafts and Bamboo Crafts, Cross-Border Trade and Regional Logistics Hub, Renewable Energy, IT and Digital Hub, Rubber, Forest-based Eco-services.
2. The four priority areas for the **state's integration with regional value chains** are **Bamboo, Spices, Digital/IT Hub and Textiles**.
3. **Strategic recommendations** for Mizoram:
 - a. Consolidate growth in Dimapur-Kohima corridor through commercial space, housing, healthcare, and skilling densification.
 - b. Accelerate Dimapur-Kohima rail completion and strengthen last-mile road connectivity from production clusters.
 - c. Develop border trade nodes with warehousing, testing, and customs facilities.
 - d. Shift to cluster-led systems with processing, certification, and branding anchored to Dimapur logistics.
 - e. Promote sector-specific clusters for bamboo, agro-processing, and construction with shared infrastructure.
 - f. Implement destination management through better access, professional hospitality, and circuit-based tourism.
 - g. Prioritize regulated downstream processing over extraction with community participation and environmental safeguards.
 - h. Expand urban services, formalize MSMEs, and leverage institutional procurement for job creation.
 - i. Promote green industrialization through engineered bamboo development with the help of processing capabilities, quality assurance systems and buyer relationships
 - j. Position tourism as structured services-sector growth engine.
 - k. Drive investment-led industrial transition via policy enablement.
 - l. Prioritize agri-processing as primary economic growth lever.
 - m. Enhance infrastructure connectivity and logistics cost management.
 - n. Strengthen cross-border economic integration initiatives.
 - o. Leverage human capital for knowledge services expansion.
 - p. Ensure fiscal sustainability through revenue architecture reforms.

21.16 Chapter 16: Nagaland

1. The **10 recommended priority areas** for Nagaland are Tourism, Agriculture and Horticulture, Food Processing, Bamboo Industries, Renewable Energy, IT and Digital Hub, Handloom and Handicrafts, Medicinal and Aromatic Plants, Forest-based Eco-services and Livestock and Fisheries.
2. The four priority areas for the **state's integration with regional value chains** are: **High-Mix Manufacturing, Food Processing, Minerals and Pharmaceuticals**.
3. **Strategic recommendations** for Nagaland:
 - a. Consolidate growth in Dimapur-Kohima corridor through commercial space, housing, healthcare, and skilling densification.
 - b. Accelerate Dimapur-Kohima rail completion and strengthen last-mile road connectivity from production clusters.
 - c. Develop border trade nodes with warehousing, testing, and customs facilities.
 - d. Shift to cluster-led systems with processing, certification, and branding anchored to Dimapur logistics.
 - e. Promote sector-specific clusters for bamboo, agro-processing, and construction with shared infrastructure.
 - f. Implement destination management through better access, professional hospitality, and circuit-based tourism.



- g. Prioritize regulated downstream processing over extraction with community participation and safeguards.
- h. Expand urban services, formalize MSMEs, and leverage institutional procurement for job creation.
- i. Position Nagaland as Act East gateway via border roads, warehousing, customs facilitation, and digital trade systems.
- j. Consolidate growth around Dimapur-Kohima corridor with managed IT spaces, healthcare, skilling institutions, and quality housing.
- k. Develop cluster-led agri and plantation value chains with quality labs, curing/roasting units, processing, and traceability systems.
- l. Industrialize bamboo, handloom, and handicrafts through consolidated clusters for shared processing, finishing, packaging, and standards compliance.
- m. Promote eco-tourism anchored in culture and landscape with planned hospitality, road connectivity, and professional destination management
- n. Establish regulated mineral-based downstream industries (cement, construction materials, battery inputs) with community participation and safeguards.
- o. Designate Dimapur-Kohima twin urban corridor as Nagaland's economic spine.

21.17 Chapter 17: Sikkim

1. The **10 recommended Priority areas** for Sikkim are Tourism, Organic agricultural and horticultural produce, Plantation focus sectors (large cardamom and tea), Sustainable connectivity and eco-sensitive urban development, Pharmaceuticals and herbal products, IT and digital services, Renewable energy, Floriculture and medicinal plants, Food processing, Natural capital and carbon services.
2. The four priority areas for the **state's integration with regional value chains** are **Spices, Pharmaceuticals, Food Processing and High-Mix Manufacturing**
3. **Strategic recommendations** for Sikkim
 - a. Accelerate completion of the Sevok-Rangpo rail link, strengthen all-weather road connectivity, and leverage digital networks to integrate Sikkim with national freight and mobility systems.
 - b. Focus industrial development on high-value, low-footprint clusters such as pharmaceuticals, wellness, and precision processing aligned with the State's environmental carrying capacity.
 - c. Pursue quality-led urban densification by upgrading civic and digital infrastructure and positioning Sikkim as a specialised governance, education, and services hub.
 - d. Strengthen services-led employment across education, healthcare, tourism, and professional services through targeted skill development aligned with sector-specific demand.
 - e. Promote premium organic products by expanding processing and cold-chain infrastructure and strengthening certification and branding for access to high-income markets.
 - f. Expand digital financial inclusion through targeted MSME and agri-credit instruments and by strengthening cooperative and regional financial institutions.
 - g. Develop high-value, low-impact tourism offerings, including wellness, eco-tourism, and cultural experiences, supported by clearly defined quality standards and capacity norms.
 - h. Embed climate resilience into infrastructure planning by strengthening disaster preparedness and promoting sustainable land-use practices across development sectors.
 - i. Position Gangtok as a high-value urban nucleus by consolidating governance, services, logistics, and knowledge functions within a compact, eco-sensitive urban framework.
 - j. Strengthen pharmaceutical and wellness manufacturing by leveraging Sikkim's clean industrial environment, skilled workforce, and alignment with high-value, low-footprint production systems.



- k. Advance organic agriculture and premium agri-exports by deepening value addition, quality standardisation, branding, and market access for high-income domestic and international markets.
- l. Strengthen education, research, and skill institutions by improving academic quality, research infrastructure, and industry linkages aligned with the State's priority growth sectors.
- m. Promote sustainable tourism and the experience economy by prioritising quality-led growth, community participation, and environmentally responsible tourism models.
- n. Strengthen regional and cross-border connectivity by enhancing transport, logistics, and trade linkages to improve market access and economic integration.

21.18 Chapter 18: Tripura

1. The **10 recommended Priority areas** for Tripura are Tourism including medical tourism, Plantation focus sectors (bamboo, rubber, tea), Agricultural and horticultural produce including organic segment, Logistics and cross-border development, Natural gas, IT and digital hub, Rubber-based MSMEs, Renewable energy, Agarwood and agar-oil, Pharmaceuticals and medical devices.
2. The four priority areas for the **state's integration with regional value chains** are: **Rubber, Tea, Pineapple and High Mix Manufacturing.**
3. **Strategic recommendations** for Tripura
 - a. Accelerate rail doubling to Agartala, expand freight capacity, develop multimodal logistics hubs, and leverage the Bangladesh border to strengthen cross-border trade integration.
 - b. Fast-track industrial infrastructure development by ensuring reliable power supply, strengthening the digital backbone, and simplifying regulatory and compliance frameworks.
 - c. Develop enterprise parks, promote integrated urbanization, and scale PPP-led infrastructure delivery to support coordinated industrial and urban growth.
 - d. Accelerate job-creating infrastructure investments, attract labour-intensive industries, and strengthen startups and local entrepreneurship ecosystems.
 - e. Promote high-value agriculture and food processing by expanding cold-chain infrastructure, building the "Brand Tripura" identity, and strengthening export linkages.
 - f. Expand digital banking access, deploy targeted MSME and agri-credit schemes, and strengthen cooperative institutions to improve financial inclusion and enterprise growth.
 - g. Position Agartala as an urban hub by consolidating administrative, logistics, services, and commercial functions to anchor industrial and trade-led growth.
 - h. Strengthen manufacturing integration by deepening linkages across raw materials, processing units, logistics networks, and end markets within the State and the wider region.
 - i. Enhance regional connectivity by improving rail, road, and cross-border linkages to reduce logistics costs and strengthen Tripura's integration with national and international markets.
 - j. Promote rubber and bamboo value addition by expanding processing capacity, improving quality standardisation, and strengthening downstream manufacturing linkages.
 - k. Advance pharmaceutical and fragrance industry synergy by leveraging Tripura's policy frameworks, biodiversity resources, and industrial infrastructure to build integrated value chains.

21.19 Chapter 19: Evolving agenda and additional steps

1. **Prepare a strategic execution roadmap aligned with Viksit Bharat 2047:** MoDoNER should develop a focused execution roadmap for selected high potential opportunities, outlining milestones, performance metrics, and monitoring systems. This will convert long term objectives into actionable, time bound implementation pathways.
2. **Conduct a follow up analytical phase to identify priority enablers:** A second-phase assessment should specify the critical enablers, binding constraints, and priority sectors needed to meet roadmap targets. This will translate the vision into a sequenced, resource realistic plan aligned with institutional and coordination capacities.
3. **Institutionalize periodic strategy reviews and recalibration:** Set up a formal mechanism for regular review of NER's strategy, supported by monitoring of external conditions and implementation progress. This ensures continuous course correction and responsiveness to evolving economic and institutional realities.
4. **Enable flexible reprioritization of resources and institutional focus:** Create systems that allow dynamic reallocation of public funds, administrative capacity, and policy attention as conditions change. This flexibility will help sustain momentum and maintain alignment between strategy, opportunities, and on-ground execution.
5. **Shift public investment toward productivity, quality, and competitiveness:** Reorient investments toward infrastructure quality, asset utilization, enterprise competitiveness, and innovation capacity. As income gaps narrow, gap filling investment yields diminish, making productivity and efficiency focused spending essential for long term growth.
6. **Concentrate capital on synergistic, high-impact investment combinations:** Prioritize integrated investments – especially infrastructure and urbanization enablers—that accelerate enterprise scaling and crowd in private capital. Such synergistic packages generate stronger economic multipliers than fragmented or stand-alone projects.
7. **Empower North Eastern Council as the apex regional planner:** Mandate NEC to lead integrated, cross-state infrastructure and value-chain planning to avoid fragmented investments and ensure long-term regional synergies. It should coordinate closely with central ministries to optimize location, sequencing, and scale.
8. **Strengthen MoDoNER's central coordination and feedback role:** Enhance MoDoNER's ability to align central and state actions through strategic guidance on prioritization and sequencing, cross ministerial coordination, and continuous feedback from implementation. This will improve execution effectiveness and coherence across the region, resolve bottlenecks, and establish a strong monitoring framework to mobilize the region's natural and human capital efficiently toward Viksit status.
9. **Advance integrated regional planning to aggregate scale and strengthen competitiveness:** Shift from fragmented, state-centric approaches toward coordinated regional planning that aligns inter-state infrastructure, value chains, and strategic economic nodes. Empower NEC to anchor regional planning architecture with MoDoNER simultaneously coordinating execution aligned to centre-state priorities.





Abbreviations

A

ADCs: Autonomous District Councils
AEO: Authorised Economic Operator
AIT: Assembly, Integration & Testing
ALG: Advanced Landing Ground
APART: Assam Agribusiness & Rural Transformation Project
APEDA: Agricultural and Processed Food Products Export Development Authority
APMC: Agricultural Produce Market Committee
APSBASAP: Arunachal Pradesh State Biodiversity Strategy and Action Plan
ASEAN: Association of Southeast Asian Nations
AT&C: Aggregate Technical and Commercial
ATUFS: Amended Technology Up-gradation Fund Scheme
AYUSH: Ayurveda, Yoga & Naturopathy, Unani, Siddha and Homoeopathy

B

BADP: Border Area Development Programme
BaU: Business as Usual
BBIN: Bangladesh-Bhutan-India-Nepal (Economic Corridor)
BCIL: Biotech Consortium India Limited
BDS: Business Development Services
BHS: Biodiversity Heritage Site
BIMSTEC: Bay of Bengal Initiative for Multi-Sectoral Technical and Economic Cooperation
BioNEST: Bio-Incubator Nurturing Entrepreneurship for Scaling Technologies
BLF: Bought-Leaf Factory
BPM: Business Process Management
BPO: Business Process Outsourcing
bps: Basis Points

C

CAG: Comptroller and Auditor General of India
CAGR: Compound Annual Growth Rate
CAMPA: Compensatory Afforestation Fund Management and Planning Authority
CBSP: Capacity Building for Service Providers
CERT-In: Indian Computer Emergency Response Team
CNC: Computer Numerical Control
CPC: Central Processing Centre
CTC: Crush, Tear, Curl
CV: Commercial Vehicle

D

DBT: Department of Biotechnology
DCGI: Drugs Controller General of India
DILRMP: Digital India Land Records Modernization Programme
DPIIT: Department for Promotion of Industry and Internal Trade
DRR: Disaster Risk Reduction

E

EMS: Electronics Manufacturing Services
ESG: Environmental, Social, and Governance
e-KYC: Electronic Know Your Customer
e-NAM: Electronic National Agriculture Market
EUDR: European Union Deforestation Regulation
EV: Electric Vehicle

F

FMBAP: Flood Management and Border Areas Programme
FPC: Farmer Producer Company
FPO: Farmer Producer Organisation
FREMAA: Flood and River Erosion Management Agency of Assam
FSC: Forest Stewardship Council
FTTH: Fibre to the Home
FY: Fiscal Year



G

GBS: Gross Budgetary Support
GDP: Gross Domestic Product
GeM: Government e-Marketplace
GI: Geographical Indication
GIS: Geographic Information System
GLOF: Glacial Lake Outburst Flood
GMP: Good Manufacturing Practices
GNI: Gross National Income
GoI: Government of India
GSDP: Gross State Domestic Product
GSVA: Gross State Value Added
GST: Goods and Services Tax
GST ITC: Goods and Services Tax Input Tax Credit
GSTN: Goods and Services Tax Network
GSI: Geological Survey of India
GVA: Gross Value Added
GW: Gigawatt

H

HDI: Human Development Index
HELP: Hydrocarbon Exploration and Licensing Policy
HLTF: High-Level Task Force
HS Codes: Harmonized System Codes

I

ICAR: Indian Council of Agricultural Research
ICD: Inland Container Depot
ICP: Integrated Check Post
ICED: India Climate & Energy Dashboard
IIMSFI: IIM Shillong Foundation for Innovation and Entrepreneurship
IITG-TIC: IIT Guwahati Technology Incubation Centre
INROAD: Indian Natural Rubber Operations for Assisted Development
INR: Indian Rupee
IoT: Internet of Things
IQF: Individually Quick Frozen
ISFR: India State of Forest Report
ISRO: Indian Space Research Organisation
ISO: International Organization for Standardization
IT / ITeS: Information Technology / IT enabled Services
ITI: Industrial Training Institute
ITTC: Integrated Textile Tourism Centre
IWT: Inland Water Transport

K

KPI: Key Performance Indicator
KPO: Knowledge Process Outsourcing

L

LCS: Land Customs Station
LMT: Lakh Metric Tonnes

M

M&E: Monitoring and Evaluation
MCA21: Ministry of Corporate Affairs 21
MCM: Million Cubic Meters
MoDoNER: Ministry of Development of North Eastern Region
MeitY: Ministry of Electronics and Information Technology
MHIS: Meghalaya Health Insurance Scheme
MIDH: Mission for Integrated Development of Horticulture
MIDIP: Manipur Industrial Development and Investment Policy
MIIPP: Meghalaya Industrial and Investment Promotion Policy
MICE: Meetings, Incentives, Conferences, and Exhibitions
MIND: Manipur Infotech eEnabled Development Project
MMLP: Multi-Modal Logistics Park
MoEFCC: Ministry of Environment, Forest and Climate Change
MoHA / MHA: Ministry of Home Affairs
MoSPI: Ministry of Statistics and Programme Implementation
MOVCDP-NER / MoVCD: Mission Organic Value Chain Development for North Eastern Region
MMSCMD: Million Metric Standard Cubic Meters per Day
MRO: Maintenance, Repair & Overhaul
MRV: Measurement, Reporting, and Verification
MSDC: Mizoram State Data Center
MSDE: Ministry of Skill Development and Entrepreneurship
MSE: Micro and Small Enterprises
MSME: Micro, Small and Medium Enterprises
MSP: Minimum Support Price
MSWAN: Mizoram State Wide Area Network
MT: Metric Tonnes
MW: Megawatt



N

NABL: National Accreditation Board for Testing and Calibration Laboratories

NABARD: National Bank for Agriculture and Rural Development

NBA: National Biodiversity Authority

NBFC: Non-Banking Financial Company

NBM: National Bamboo Mission

NBSAP: National Biodiversity Strategy and Action Plan

NCAER: National Council of Applied Economic Research

NDCNER: National Data Centre – North East Region

NDRF: National Disaster Response Fund

NECTAR: North East Centre for Technology Application and Reach

NEC: North Eastern Council

NECBDC: North East Cane and Bamboo Development Council

NEDFi: North Eastern Development Finance Corporation Ltd.

NEHHDC: North Eastern Handicrafts & Handlooms Development Corporation Ltd.

NEIDS: North East Industrial Development Scheme

NEIGRIHMS: North Eastern Indira Gandhi Regional Institute of Health and Medical Sciences

NEEPCO: North Eastern Electric Power Corporation Ltd.

NEBPS: North East BPO Promotion Scheme

NER: North Eastern Region

NERAMAC: North Eastern Regional Agricultural Marketing Corporation Ltd.

NERCORMS: North Eastern Region Community Resource Management Project for Upland Areas

NERTPS: North Eastern Region Textile Promotion Scheme

NESIDS: North East Special Infrastructure Development Scheme

NFSM: National Food Security Mission

NGDRS: National Generic Document Registration System

NHHDC: Nagaland Handloom & Handicrafts Development Corporation

NIC: National Informatics Centre

NIELIT: National Institute of Electronics & Information Technology

NIFT: National Institute of Fashion Technology

NIP: National Infrastructure Pipeline

NITI Aayog: National Institution for Transforming India

NLUP: New Land Use Policy

NSDC: National Skill Development Corporation

NSDP: Net State Domestic Product

NSQF: National Skills Qualifications Framework

NSRLM: Nagaland State Rural Livelihoods Mission

NTFP: Non-Timber Forest Produce

NW 2 / NW 16: National Waterway 2 / National Waterway 16

O

O&M: Operations and Maintenance

ODOP: One District One Product

OEM: Original Equipment Manufacturer

OIL: Oil India Limited

ONGC: Oil and Natural Gas Corporation

OPD: Outpatient Department

OSAT: Outsourced Semiconductor Assembly and Test

OTPC: ONGC Tripura Power Company Limited

OTT: Over The Top

P

PARIVESH: Pro-Active and Responsive Facilitation by Interactive, Virtuous and Environmental Single-window Hub

PCB: Printed Circuit Board

PCD: Propaganda cum Distribution

PCG: Partial Credit Guarantees

PCGSDP / PC-GSDP: Per Capita Gross State Domestic Product

PES: Payment for Ecosystem Services

PLI: Production-Linked Incentive

PLFS: Periodic Labour Force Survey

PM-DevINE: Prime Minister's Development Initiative for North Eastern Region

PMEGP: Prime Minister's Employment Generation Programme

PMFME: Pradhan Mantri Formalisation of Micro Food Processing Enterprises

PMGSY: Pradhan Mantri Gram Sadak Yojana

PMJDY: Pradhan Mantri Jan Dhan Yojana

PMKVY: Pradhan Mantri Kaushal Vikas Yojana

PM-KUSUM: Pradhan Mantri Kisan Urja Suraksha evam Utthaan Mahabhiyan

PM-MITRA: Pradhan Mantri Mega Integrated Textiles Regions and Apparel Park

PMMSY: Pradhan Mantri Matsya Sampada Yojana

PPP: Public-Private Partnership

PRASHAD: Pilgrimage Rejuvenation and Spiritual Heritage Augmentation Drive

PRIME: Promotion and Incubation of Market-driven Enterprises

PTR: Pupil-Teacher Ratio

PV: Present Value

Q

QC: Quality Control



R

RDSS: Revamped Distribution Sector Scheme
REE: Rare Earth Elements
REDD+: Reducing Emissions from Deforestation and Forest Degradation
RIMS: Regional Institute of Medical Sciences
RKVY-RAFTAAR: Remunerative Approach for Agriculture and Allied Sectors Rejuvenation
RPL: Recognition of Prior Learning
RTE: Ready To Eat
RTD: Ready To Drink
RBI: Reserve Bank of India
R&I: Research & Innovation

S

SaaS: Software as a Service
SAPCC: State Action Plan on Climate Change
SCADA: Supervisory Control and Data Acquisition
SDG: Sustainable Development Goals
SDRF: State Disaster Response Fund
SEA: Strategic Environmental Assessment
SEZ: Special Economic Zone
SITP: Scheme for Integrated Textile Park
SMAM: Sub-Mission on Agricultural Mechanization
SPTF: Special Purpose Tea Fund
SPV: Solar Photovoltaic
SSC: Sector Skill Council
SSDG: State Service Delivery Gateway
STPI: Software Technology Parks of India
SWOT: Strengths, Weaknesses, Opportunities, and Threats

T

TDPS: Tea Development & Promotion Scheme
TIIP: Tripura Industrial Investment Policy
TIIPIS: Tripura Industrial Investment Promotion Incentive Scheme
TPH: Tonnes Per Hour
TREDA: Tripura Renewable Energy Development Agency
TRIFED: Tribal Co-operative Marketing Development Federation of India
TSAT: Technology, Semiconductor & Advanced Tech

U

UA: Urban Agglomeration
UAV: Unmanned Aerial Vehicle
UDAN: Ude Desh ka Aam Nagrik
UDISE+: Unified District Information System for Education Plus
ULIP: Unified Logistics Interface Platform
UN: United Nations
UNESCO: United Nations Educational, Scientific and Cultural Organization
UNNATI: Uttar Poorva Transformative Industrialization Scheme
USOF: Universal Service Obligation Fund
USD: United States Dollar

V

VAT: Value Added Tax
VGf: Viability Gap Funding
VVP: Vibrant Villages Programme

W

WHO: World Health Organization

List of figures

Figure 1: NER's sectoral composition of GDP (FY12-FY24)	20
Figure 2: NER contribution to India's GDP (FY12-FY24).....	20
Figure 3: % of Agriculture and allied sector (Internal components)	21
Figure 4: % of India (agriculture components share).....	21
Figure 5: % of Industry Sector (internal components).....	21
Figure 6: % of India (industry components share)	21
Figure 7: % of service sector (Internal components).....	22
Figure 8: % of India (service components share)	22
Figure 9: GSDP shares by states.....	25
Figure 10: NER per capita GSDP trajectories and Viksit targets.....	32
Figure 11: Aggregate regional GSDP growth: Business as Usual (BaU) vs. Viksit trajectory	33
Figure 12: Growth architecture to FY47: Focus sectors catalysing economy-wide momentum	42
Figure 13: Three gears of the investment engine	43
Figure 14: Infrastructure investment strategy.....	44
Figure 15: Historical allocation in National Infrastructure Pipeline for FY13-19E	45
Figure 16: Projected allocation in National Infrastructure Pipeline for 2020-25	45
Figure 17: Preferred projected allocation for NER through FY48	46
Figure 18: Bamboo product sector snapshot	79
Figure 19: Rubber product sector snapshot.....	83
Figure 20: Pineapple product sector snapshot	87
Figure 21: Tea product sector snapshot	91
Figure 22: Rice: product sector snapshot.....	95
Figure 23: Spices: product sector snapshot	99
Figure 24: Kiwi product sector snapshot	103
Figure 25: Fisheries product sector snapshot	107
Figure 26: Textiles product sector snapshot	111
Figure 27: Pharmaceuticals product sector snapshot	115
Figure 28: High-mix manufacturing product sector snapshot.....	122
Figure 29: NER international border matrix	139
Figure 30: NER border matrix and strategic villages	140
Figure 31: China attains world average urbanization; China's urbanization and per capita GDP levels crossed India's in 1988-1993. Inputs from NER states do not indicate focus on urbanization.....	148
Figure 32: High correlation between per capita GSDP and urbanization rate suggests greater focus needed on urban development to accelerate GSDP growth in NER.....	149
Figure 33: Global examples: Simulating larger cities to drive higher efficiencies with smaller agglomerations - creating urban economic corridors.....	150
Figure 34: Tokyo's population growth amid national population decline	151
Figure 35: Dubai 'then vs. now' urban development images.....	152
Figure 36: Benchmarks and projections for 2047 - Urbanization in NER.....	155
Figure 37: Investment required for accelerated urbanization scenario in NER.....	157
Figure 38: Potential impact of urbanization investment on NER GDP	158
Figure 39: Arunachal Pradesh GSDP.....	215
Figure 40: Arunachal Pradesh per capita GSDP.....	215
Figure 41: India vs NER vs Arunachal Pradesh sectoral shares.....	216
Figure 42: Arunachal Pradesh's sectoral composition of GSDP	226

Figure 43: Arunachal Pradesh's contribution to India's GDP	226
Figure 44: % of Arunachal Pradesh's agriculture and allied sector	227
Figure 45: % of India (Arunachal Pradesh share in agriculture).....	227
Figure 46: % of Arunachal Pradesh's industry sector	228
Figure 47: % of India (Arunachal Pradesh share in industry)	228
Figure 48: % of Arunachal Pradesh's service sector	229
Figure 49: % of India (Arunachal Pradesh share in services).....	229
Figure 50: Assam GSDP	235
Figure 51: Assam per capita GSDP	235
Figure 52: India vs NER vs Assam sectoral shares	236
Figure 53: Assam's sectoral composition of GSDP	246
Figure 54: Assam's contribution to India's GDP	246
Figure 55: % of Assam's agriculture and allied sector.....	247
Figure 56: % of India (Assam share in agriculture)	247
Figure 57: % of Assam's industry sector	248
Figure 58: % of India (Assam share in industry)	248
Figure 59: % of Assam's services sector	249
Figure 60: % of India (Assam share in services)	249
Figure 61: Manipur GSDP	257
Figure 62: Manipur per capita GSDP	257
Figure 63: India vs NER vs Manipur sectoral shares	258
Figure 64: Manipur's sectoral composition of GSDP.....	268
Figure 65: Manipur's contribution to India's GDP.....	268
Figure 66: % of Manipur's agriculture and allied sector	270
Figure 67: % of India (Manipur share in agriculture).....	270
Figure 68: % of Manipur's industry sector	271
Figure 69: % of India (Manipur share in industry).....	271
Figure 70: % of Manipur's service sector	272
Figure 71: % of India (Manipur share in services).....	272
Figure 72: Meghalaya GSDP.....	279
Figure 73: Meghalaya per capita GSDP	279
Figure 74: India vs NER vs Meghalaya sectoral shares	280
Figure 75: Meghalaya's sectoral composition of GSDP	289
Figure 76: Meghalaya contribution to India's GDP	289
Figure 77: % of Meghalaya's agriculture and allied sector	290
Figure 78: % of India (Meghalaya share in agriculture)	290
Figure 79: % of Meghalaya's industry sector	291
Figure 80: % of India (Meghalaya share in industry)	291
Figure 81: % of Meghalaya's service sector	292
Figure 82: % of India (Meghalaya share in services)	292
Figure 83: Mizoram GSDP.....	299
Figure 84: Mizoram per capita GSDP.....	299
Figure 85: India vs NER vs Mizoram sectoral shares.....	300
Figure 86: Mizoram's sectoral composition of GSDP	309
Figure 87: Mizoram's contribution to India's GDP	309
Figure 88: % of Mizoram's agriculture and allied sector	310

Figure 89: % of India (Mizoram share in agriculture)	310
Figure 90: % of Mizoram's industry sector	311
Figure 91: % of India (Mizoram share in industry)	311
Figure 92: % of Mizoram's service sector	312
Figure 93: % of India (Mizoram share in services)	312
Figure 94: Nagaland GSDP	319
Figure 95: Nagaland per capita GSDP	319
Figure 96: India vs NER vs Nagaland sectoral shares	320
Figure 97: Nagaland's sectoral composition of GSDP	330
Figure 98: Nagaland contribution to India's GDP	330
Figure 99: % of Nagaland agriculture and allied sector	332
Figure 100: % of India (Nagaland share in agriculture)	332
Figure 101: % of Nagaland's industry sector	333
Figure 102: % of India (Nagaland share in industry)	333
Figure 103: % of Nagaland's service sector	334
Figure 104: % of India (Nagaland share in services)	334
Figure 105: Sikkim GSDP	343
Figure 106: Sikkim per capita GSDP	343
Figure 107: India vs NER vs Sikkim sectoral shares	344
Figure 108: Sikkim's sectoral composition of GSDP	353
Figure 109: Sikkim contribution to India's GDP	353
Figure 110: % of Sikkim agriculture and allied sector	355
Figure 111: % of India (Sikkim share in agriculture)	355
Figure 112: % of Sikkim industry sector	356
Figure 113: % of India (Sikkim share in industry)	356
Figure 114: % of Sikkim service sector	357
Figure 115: % of India (Sikkim share in services)	357
Figure 116: Tripura GSDP	365
Figure 117: Tripura per capita GSDP	365
Figure 118: India vs NER vs Tripura sectoral shares	366
Figure 119: Tripura's sectoral composition of GSDP	374
Figure 120: Tripura's contribution to India's GDP	374
Figure 121: % of Tripura's agriculture and allied sector	375
Figure 122: % of India (Tripura share in agriculture)	375
Figure 123: % of Tripura's industry sector	376
Figure 124: % of India (Tripura share in industry)	376
Figure 125: % of Tripura's service sector	377
Figure 126: % of India (Tripura share in services)	377
Figure 127: Three gears of the investment engine	391

List of tables

Table 1: State-wise per capita GSDP targets	32
Table 2: Phased PC-GSDP growth pathway	34
Table 3: Renewable energy capacity and potential - NER (State-wise, MW).....	37
Table 4: Proposed advantage sector projections	40
Table 5: State-wise status – Resource availability vs. processing infrastructure (Bamboo).....	80
Table 6: Downstream Bamboo products and industry scope	82
Table 7: State wise status: Raw availability and processing infrastructure (Rubber).....	84
Table 8: Downstream Rubber products and industry scope.....	85
Table 9: State-wise status: Resource availability and processing infrastructure (Pineapple).....	88
Table 10: Downstream pineapple products and industry scope	90
Table 11: State wise status: Resource availability and processing infrastructure (Tea)	92
Table 12: Downstream tea products and industry scope.....	94
Table 13: State wise status: Resource availability and processing infrastructure (Rice)	96
Table 14: Downstream rice products and industry scope	98
Table 15: State wise status: Resource availability and processing infrastructure (Spices)	100
Table 16: Downstream spices products and industry scope	102
Table 17: State wise status: resource availability and processing infrastructure (Kiwi).....	104
Table 18: Downstream kiwi products and industry scope.....	106
Table 19: State wise status: Resource availability and processing infrastructure (Fisheries)	108
Table 20: Downstream fisheries products and industry scope	110
Table 21: State wise status: Resource availability and processing infrastructure (Textiles)	112
Table 22: Downstream textiles products and industry scope	114
Table 23: State wise status: Resource availability and processing infrastructure (Pharmaceuticals).....	116
Table 24: Downstream pharma products and industry scope	118
Table 25: State wise status: Resource availability and processing infrastructure (Food processing)	119
Table 26: Downstream food processing products and industry scope.....	121
Table 27: State wise status: Resource availability and processing infrastructure (High-Mix Manufacturing)	123
Table 28: Downstream high-mix manufacturing product scope	125
Table 29: State wise status: Resource availability and digital infrastructure (Digital / IT Hubs).....	127
Table 30: Downstream digital and IT product scope	129
Table 31: State wise status: Tourism resource base and infrastructure	130
Table 32: Tourism products and experience scope.....	132
Table 33: State wise status: Resource base and processing infrastructure (Minerals).....	133
Table 34: Downstream mineral-based products scope	135
Table 35: NER Border Village analysis, proposed proforma and checklist	143
Table 36: Growth of urbanization across NER states from 2001 through 2011 To projected levels In 2021 (in thousands).....	146
Table 37: Major urban centres of NER: Population trends and industrial base.....	147
Table 38: Rhine-Ruhr S-Bahn rail network / Bay Area city / county populations	150
Table 39: Key indicators of Tokyo case study	151
Table 40: Key indicators of Dubai case study	152
Table 41: Key reasons for low urbanization in NER	153
Table 42: Potential sector-wise impacts of urbanization in NER	154
Table 43: Top 20 cities in India / Top 23 cities in NER	156
Table 44: Tokyo vs. Guwahati - Earthquake exposure and urbanization comparison.....	157

Table 45: High-level urban planning interventions for the region.....	159
Table 46: SDG-4 district index categories by state	182
Table 47: India/State/UT school distribution by primary/secondary level.....	183
Table 48: Key observations on migration pattern across NER states.....	189
Table 49: State-wise forest cover and quality, carbon stock and strategic significance in the NER	196
Table 50: Key policy and institutional measures supporting biodiversity and climate action in NER	197
Table 51: NER renewable energy summary indicators	200
Table 52: Recognized disaster hazards and state-wise differentiation144F	204
Table 53: State overview (Arunachal Pradesh)	214
Table 54: Key challenges and strategic approach (Arunachal Pradesh)	231
Table 55: State overview (Assam).....	234
Table 56: Value Chain wise resource availability and processing infrastructure (Assam).....	244
Table 57: Key challenges and strategic approach (Assam).....	251
Table 58: State overview (Manipur)	256
Table 59: Key challenges and strategic approach (Manipur).....	274
Table 60: State overview (Meghalaya).....	278
Table 61: Key challenges and strategic approach (Meghalaya)	294
Table 62: State overview (Mizoram)	298
Table 63: Key challenges and strategic approach (Mizoram)	314
Table 64: State overview (Nagaland).....	318
Table 65: Key challenges and strategic approach (Nagaland).....	337
Table 66: State overview (Sikkim).....	342
Table 67: Key challenges and strategic approach (Sikkim)	359
Table 68: State overview (Tripura)	364
Table 69: Key challenges and strategic approach (Tripura)	379

North East Vision 2047 presents a forward-looking roadmap for transforming the North Eastern Region into a vibrant hub of economic growth, connectivity, sustainability, and cultural vitality. Prepared by the North Eastern Council (NEC), Ministry of Development of North Eastern Region (DoNER), the document reflects the collective aspirations of the eight states and their people.

It outlines strategic priorities to strengthen infrastructure, promote entrepreneurship and livelihoods, harness natural resources responsibly, and position the region as India's gateway to Southeast Asia. Rooted in inclusivity, innovation, and sustainability, this vision seeks to unlock the immense potential of the region and contribute meaningfully to India's journey towards Viksit Bharat 2047.

