Knowledge Report on
Sustainable Tourism in North East India

5th North East Connectivity Summit

November 14-15, 2018





FOREWORD BY EY

Ernst & Young LLP (EY) is proud to release this knowledge report on Sustainable Tourism North East India at the 5th North East Connectivity Summit at Tawang from 15-16 November 2018. The report focuses on the strategic location of the North East Region, the importance of Tourism as a key growth driver for the region, policy initiatives of State Governments, challenges and investment opportunities in the Tourism sector in the region.

The region has not developed at par with rest of India and lack of infrastructure and connectivity has been one of the key reasons for the relatively slow progress of developmental activities. The last few years have been a watershed moment for the region with the Central Governments' focus on creating enabling infrastructure and the aggressive push to bring the region at par with the rest of the country.

Progressive State Governments in the region are now vying for investment along with other developed and developing states in the country and are seeking large scale employment generation through private sector involvement in key areas such as Tourism. This report aims to put forth the inherent strengths, challenges, opportunities and a vision for the sector in North Eastern Region

EY's Economic Development Advisory (EDA) practice works with various State Governments including in the North East Region and helps them in policy formulation and review, infrastructure development & promotion, investment & trade promotion, sector & regional promotion and implementing 'Ease of Doing Business' Reforms.

We are thankful to Ranjit Barthakur, Chairman, FICCI North East Advisory Council for providing us with the opportunity to be the Knowledge Partner for this annual flagship event. Along with Ministry for Development of North East Region (DoNER) and North Eastern Council (NEC), we aim to work together with State Governments in development of the region and especially the Tourism Sector.

Adil Zaidi
Partner - Economic Development Advisory
Ernst & Young LLP

FOREWORD BY FICCI

Over the last few years, the North East Advisory Council of FICCI has deliberated at length the idea of connecting the region through culture, infrastructure, trade and biodiversity. We have consulted a cross-section of stakeholders in the region and in our Neighbouring Countries. While our belief in the potential of the region has grown stronger, it has also become apparent that the most critical part is to restore the linkages.

In 2022 India will celebrate 75 years of independence and the country is gearing up to meet the aspirations of an increasingly educated and young nation. With a booming population and finite resources this is no mean task. While the country has already crossed many milestones and achieved phenomenal progress in many field of human endeavour it is yet to fully overcome many challenges that independent India was born with and many more that have come up in the decades since independence.

The North East region with 5300 kms of international borders, and its geographic position can easily be positioned as the hub of trade, commerce and connectivity between India and South East Asia and even China in times to come. Already three major projects of Pan Asian Connectivity, the Asian Highway I and II and the Trans-Asian Railway are proposed to crisscross the region before connecting Bangladesh, Nepal the Indian Mainland and beyond. While these initiatives inspire hope, a lot more will be required in terms of planning and action on the ground to ensure inclusive growth in this strategically important part of India. FICCI has proposed a comprehensive development strategy for the region which aims to fulfil the aspirations of the region and presents a vision for the region when Independent India turns 75, six years from now.

With more than 220 ethnic groups with equal number of dialects the region is one of the most culturally diverse regions of the world. Apart from this the region also has a large number of historical and religious sites of great significance. North East India is also rich in biological diversity and contains more than one-third of the country's total biodiversity. The region is considered one of the 18 hotspots of the world. The ecosystem diversity of the region ranges from tropical ecosystems to alpine ecosystems in the Himalayan ranges and also includes wetlands, flood plains, riverine and aquatic ecosystems. Endowed with these diverse attractions have North East India is well placed to become one of the most sought-after tourism hotspots in the world. Yet the region is one of the least explored tourism destinations of the world.

We believe that, with improved connectivity and a focused marketing campaign the region can become a favoured high end eco-tourism destination, and the states of the region should together aim at contributing at least 10% of India's foreign exchange earnings from tourism. While these might seem like wishful thinking, these are the goals that India must strive towards if the region is to be able to contribute its full share towards nation building.

The 1st and 2nd Connect North East held in Guwahati and Shillong explored the potential to build upon and expand traditional trade linkages with neighbouring countries, to create new and upgrade existing infrastructure in roads, railways, airways, and waterways and the scope for a North East economic corridor amongst others.

The 3rd North East Connectivity Summit in Tripura highlighted the potential for value creation by enhancing connectivity networks and baselining the existing situation in the BBIN region while keeping the NER in focus

For the 4th North East Connectivity Summit the Government of Nagaland had lend us tremendous energy by driving the summit from the front. The Summit helped in a better understanding of development of Service Sector Linkages in North East and leveraging Cross Border trade between North East Region and neighbouring countries

We thank and compliment the Government of Arunachal Pradesh for having readily agreed to host the 5th North East Connectivity Summit. In particular, I would like to thank Hon'ble Chief Minister Mr. Pema Khandu and his proactive team of ministers and officers for their support and guidance.

The year ahead presents an exciting opportunity for expanding the impetus on Integrated development led by core focus on Connectivity with respect to the North East Region. The learnings from the Connect North East initiative needs to be translated into projects that are implemented at a fast pace.

The present Study, highlights some the potential areas and suggests a way forward for policy makers apart from identifying potential domestic & international circuits and also presents a small shelf of viable projects.

I would like to thank the team at Ernst and Young LLP who worked with us to prepare this important report. I hope the report serves as a useful tool for policy makers and investors looking at investing in the development of the North East Indian Story.

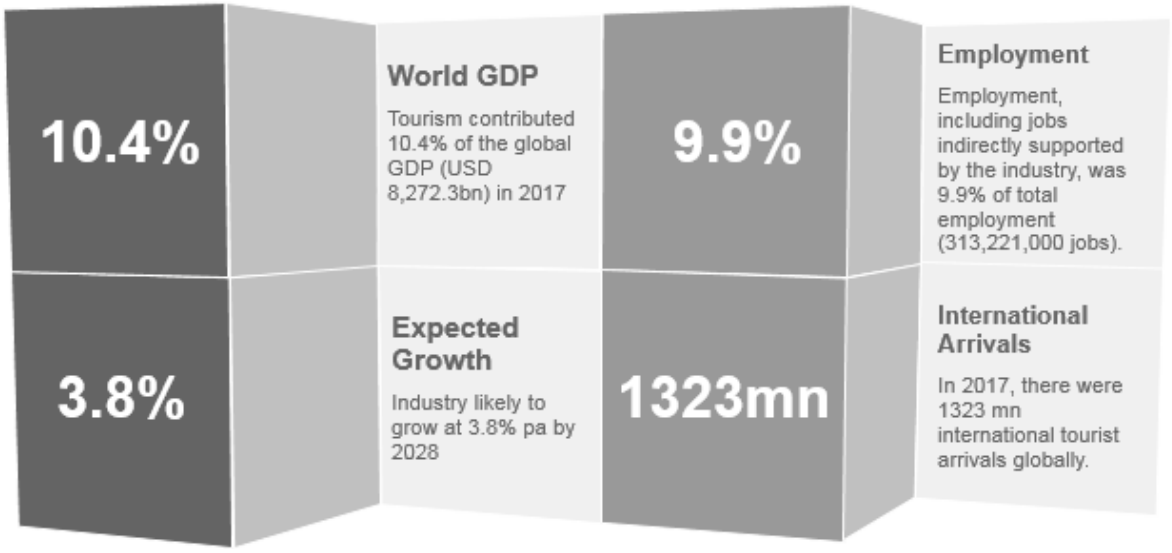
Ranjit Barthakur
Chairman
FICCI North East Advisory Council

Overview of Tourism Sector

1. Introduction

Tourism is the fastest growing industry in the world. The substantial growth of the tourism activity clearly makes tourism as one of the most remarkable economic and social phenomena of the past century. Tourism has emerged as an instrument for employment generation, poverty alleviation and sustainable human development. Several countries have transformed their economies using their tourism potential.

Over past six decades, tourism has continuously expanded and diversified with ever-increasing number of destinations, to become one of the largest and fastest-growing economic sectors in the world. In a broader sense, Tourism is about travel, travellers and visitors, which creates opportunities for various businesses and influences wide range of industries. These industries that provide consumption goods and services together constitute the 'Tourism Sector'. Hence, tourism is not only a growth engine but also an employment creator, impacting both the economic and socio-cultural development of a country. Key highlights of the impact of tourism sector globally is shown below:



The Travel & Tourism (T&T) industry is the largest contributor to employment and economy, which is 10.4% of the global GDP (USD 8,272.3bn)[1] in 2017, including direct, indirect and induced impacts. Despite the slow economic growth, the tourism sector has shown significant resilience globally.

This upward trend in T&T sector is likely to rise by 4.0% in 2018, and to rise by 3.8% pa to USD12,450.1bn (11.7% of GDP) in 2028 - faster than financial services, transport and manufacturing sectors.

In 2017, the total contribution of Travel & Tourism to employment, including jobs indirectly supported by the industry, was 9.9% of total employment (313,221,000 jobs). This is expected to rise by 3.0% in 2018 to 322,666,000 jobs and rise by 2.5% pa to 413,556,000 jobs in 2028 (11.6% of total).

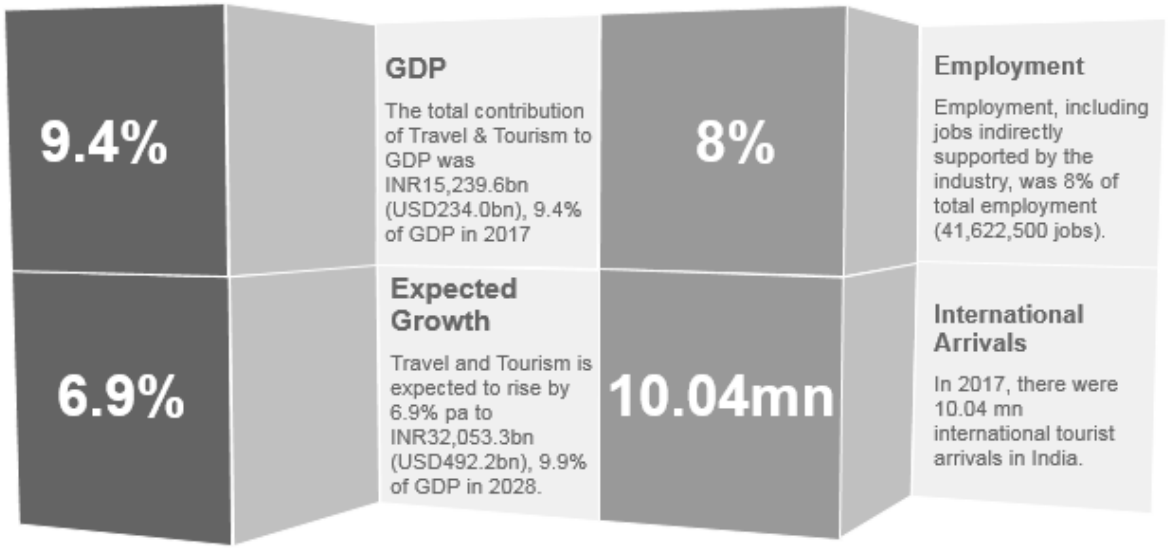
Tourism, a labour intensive sector, presents huge employment prospects to insure quality delivery of products and services. Human capital is central to the efficient and effective operation and thriving of tourism and related industries.

[1] World Travel and Tourism Council- Economic Impact 2018

Tourism industry in India has witnessed a boom in recent years, with people across the globe traveling here to experience the country's natural beauty cultural diversity, and climatic regions.

India has moved up 12 positions to 40th (among 136 economies across the world in 2017) rank from 52nd in Tourism & Travel Competitive Index (TTCI) released by the World Economic Forum (WEF). Number of arrivals in India is expected to increase further with the World Travel and Tourism Council naming the country the eleventh fastest-emerging tourism destination in the world.

Key highlights of the impact of tourism sector nationally is shown below:



Domestic tourist visits to all states/UTs has increased in India by 2.3% in 2017 from the previous year. There were 1652.49 million domestic tourist visits in 2017.

Largest number of foreign tourist arrivals are usually seen during the winter months of December and January when temperatures are more tolerable.

Foreign tourist arrivals in India has grown at an impressive rate of 8% between 2000 and 2017.



India's Foreign exchange earnings from Tourism in 2017 stood at Rs.177874 Crore (US$ 27.31 Billion) which grew at 15.4% from the previous year.

Tourism in North East India

2. Tourism in North East India

OVERVIEW

The North Eastern Region (NER) of India occupies a unique place in terms of natural beauty. The natural beauty, the environment, the unique flora and fauna of the region, its large bio-diversity, rolling hills, green valleys, virgin forests and diverse culture and tradition can make Northeast, the Paradise for Tourists. Unlike other tourist destinations of the country, the North East presents conditions to attract tourists throughout the year.

North East India, popularly known as North East (NE), comprises the eight States of Arunachal Pradesh, Assam, Manipur, Meghalaya, Mizoram, Nagaland, Tripura and Sikkim and geographically situated in the North East corner of India, at Latitude 21.57°N - 29.30°N and Longitude 88°E - 97.30°E with an area of 25.5 million Sq. Km. It comprises 7.97% of the land area of the country. NE shares the international boundaries of India with China to the North, Bangladesh to the South West, Bhutan and Nepal to the North West and Myanmar to the East. This region is connected with the rest of India only through a narrow corridor in North Bengal, known as Chicken Neck, having an approximate width of 33 km on the eastern side and 21 km on the western side.

Among the North Eastern states, Assam took the pioneering step to recognize tourism as a sector of economy in as back as 1958. When the British declared Kaziranga a game reserve in 1916 and wildlife sanctuary in 1950, Assam was projected as an attractive destination for tourists, particularly those who are interested in nature and wildlife observation. Apart from it, Shillong, the administrative headquarter of the Assam province during the British period witnessed an environment of outdoor recreation initiated by the colonial ruler. In response to this at least some people from inside and outside the state started visiting Kaziranga, Shillong and also the Kamakhya temple (Guwahati) in the later part of 1930s which may be considered to be the humble beginning of modern tourism in the region. Since then significant changes have taken place in the region's tourism sector because of the efforts made by the central and the respective state government in this direction. However, tourism as an industry is of recent origin in Northeast India and despite a long history of both international and domestic tourists, tourism sector of this region is still in infancy, witnessing merely 0.57% and 0.62% of the domestic and foreign tourist arrivals respectively of the country.

Arunachal Pradesh

Located in the Northeast of India, Arunachal Pradesh is the largest of the 7 sister states. It shares borders with the neighbouring countries of Bhutan in the west, China (Tibet) in the north & northeast & Myanmar in the east and southeast. The Indian states of Assam & Nagaland border it in the south. Tourism has grown rapidly in the recent years with eco and adventure tourism, cultural tourism and religious tourism being the major areas of interest. Major sports of interest to travellers include angling, boating, rafting, trekking and hiking.

Arunachal Pradesh is an "Orchid Paradise", accounting for 601 species of orchids, or 52% of the species known in India. Various orchid centres are situated in Itanagar, Tipi, Sessa, Dirang, Jengging, Roing, which have a good germ-plasm collection of nearly 400 species of orchids as well as hybrids. An orchid research centre has been established at Tipi to promote orchid conservation, research and development.

Popular tourist attractions include Tawang (a town with a Buddhist monastery) at 3,000 m elevation, Ziro (which holds cultural festivals), Basar, the Namdapha tiger project in Changlang district and Sela lake near Bomdila with its bamboo bridges overhanging the river.

The inception of railways in the state is expected to boost tourist arrivals. The Government inked a MoU with the Indian Railway Catering and Tourism Corporation for promoting the tourism sector. To boost tourist inflow and make the state more visitor friendly, the Government is working on simplifying the process of application & issuance of the Inner Line Permit. The adjoining figure shows the number of foreign tourist arrived in Arunachal Pradesh during the period mentioned[2].

In 2015-16, foreign tourist arrivals in the state stood at 5,700 tourists. Under the Swadesh Darshan scheme, for the development of adventure tourism in the state, US$14.83 million was sanctioned by the state government, during 2015-16.

Assam

Assam is located in the northeast of India. The state shares its borders with Arunachal Pradesh, Nagaland, Manipur, Mizoram, Meghalaya, Tripura and West Bengal. The state shares international borders with Bangladesh and the Kingdom of Bhutan. Assam is India's gateway to Northeast India and acts as a vital link for trade with Southeast Asian countries. The state is known for its tea, petroleum resources, muga silk and bio-diversity. It is also becoming an increasingly popular destination for wildlife tourism.

With its pleasant climate and scenic landscape, Assam is a popular tourist destination. Assam is the most popular tourist destination among the north-eastern states. With its five national parks and 15 wildlife sanctuaries, Assam is a popular tourist destination. The state offers visitors a variety of choices from world heritage (leisure) sites to temples and monuments to adventure tourism.

As part of its Vision 2010, the state intends to make it as the preferred tourist destination Promote eco-tourism and river cruise tourism; infrastructure development and beautification of historical places Assam has adopted numerous investor-friendly policies to attract investments and accelerate industrial development. Key areas of focus include the IT, tourism and power sector.

Under the Swadesh Darshan Scheme, amount sanctioned by the government during 2015-16 for wildlife circuit was US$ 14.61 million. Under the Prasad Scheme, for the expansion of Kamakhya temple along with pilgrimage destinations in and around Guwahati, the government sanctioned US$ 5.19 million during the same period.

The key tourist destinations in the state are:

- Wildlife sanctuaries: Bhejan-Borajan-Padumoni, Panidehing, Nambor-Doigurung, Nambor, Sonai- Rupai, Laokhowa, Pobitora, Marat Longri, etc.

[2] Ministry of Tourism

- National parks: Kaziranga, Manas, Orang, Nameri and Dibru-Saikhowa.
- Leisure/scenic beauty spots: Chandubi, Bhairabkunda, Daranga, Bhalukpung and Haflong.
- Pilgrimage sites: Guwahati, Hajo, Majuli and Batadrawa.
- Golf courses with air strips: Narengi, Borsola and East Boraoi.
- Historical places: Rang Ghar, Talatal Ghar, Kareng Ghar, Agnigarh and Madan Kamdev archeological site.

Besides the existing national tourism circuit within Assam, the state plans to add several thematic and eco-tourism circuits. The subsidiary and regional circuits would boost domestic tourism. Due to the high potential for development of wildlife tourism in the state, the central government has increased the funds under the centrally sponsored "Integrated Development of Wildlife Habitats" scheme towards the state.

During 2015-16, the Tourism Department started draft work on a policy of incentives for the tourism industry. During 2015-16, various projects related to the tourism sector were completed, which include "Development of Tourist Arrival cum Reception Centre, Guwahati", "Development of Heritage and Eco-Tourism Resort at Majuli", "Destination Development of Brahmaputra River Front and Cruise Vessel on Brahmaputra", etc. Further, the state government has proposed to handle more road shows across the National and International level and will also be constructing a Tea Museum in Dibrugarh, during 2016-17. In January 2017, Assam Tourist Development Corporation signed a MoU in Guwahati with Rightstay, a subsidiary of MakeMyTrip, to promote the concept of homestay in the state.

Manipur

Due to its wealth of flora and fauna, Manipur is described as a 'flower on lofty heights', 'a jewel of India' and 'Switzerland of the East'. Its breath-taking scenic beauty makes it a tourist's paradise. As per Vision 2020, the state government is committed to create Information kiosks and tourist service centres at prominent places. Promote tourism by showcasing the wild life, religious traditions, adventure, art and culture of the state.

In 2015, the number of foreign tourist arrivals in the state were recorded to be 3,260. The key tourist destinations in the state include the following:

- The Keibul Lamjao National Park on the bank of the Loktak Lake, the only habitat of brow antlered deer, which is locally known as 'Sangai'.
- The Indian National Army Memorial at Moirang, where the Indian National Army hoisted the tri-colour flag for the first time on Indian soil.
- The Siroy National Park at Ukhrul.
- Loktak lake, the biggest fresh water lake in the Northeast.

Two famous projects – Loktak Tourism/Wild Life Circuit and Ethnic/Adventure Tourism Circuit have promoted investments in state's tourism sector. In November 2016, the state organized the 10-day Manipur Sangai Festival, themed 'Destination Manipur' to promote the state as a tourist destination. The state government has formulated a Tourism Policy in 2014 that provides a host of incentives to the key stakeholders of the tourism sector.

Meghalaya

Meghalaya, one of the most picturesque states in the country, has two National Parks and three wildlife sanctuaries. It offers many adventure tourism opportunities like mountaineering, rock climbing, hiking & trekking, water sports, etc. Meghalaya is richly endowed with flora, fauna, thick forests, ancient forest groves, large rivers and grass fields – making it an attractive tourism destination.

Number of tourists visiting Meghalaya grew by 4.76%, which increased from 692,000 in 2013-14 to 725,000 in 2014- 15. In 2014-15, Meghalaya witnessed domestic tourist footfalls of 716,000, while the number of foreign visitors reached 9,000. Caving is a major tourist attraction in the state, as most of the deepest and longest caves in South Asia are located in the state. The Shillong Golf Course is one of the oldest and best natural golf courses in the world and is Asia's second 18-hole natural golf course.

Under budget 2016-17, the state government sanctioned US$ 5.43 million for development of the tourism sector in the state. Further, the state government established two recreational parks in Mairang and Marngar during the same period. Various skill development programmes are also being undertaken in the state to improve employability in the tourism sector as per budget 2016-17. Moreover, the state government will emphasize on recognising and enhancing new tourist destinations in the state during 2016-17. Under the 12th Five Year Plan (2012-2017), US$ 25.3 million were allocated for the development of the tourism sector in the state. The various areas of focus include development of tourist spots, development of wildlife tourism and adventure tourism.

In November 2016, with an aim to promote motor sports and tourism in Meghalaya, the state organized the second edition of 'Bilgaro Challenge 2016'. As per the state Tourism Policy of 2011, Meghalaya Government intends to develop the following segments;

a) Adventure & Sports Tourism; b) Wildlife & Eco Tourism; c) Cultural Tourism; d) MICE Tourism; e) Wellness Tourism; f) develop unique lodging products; g) Local Souvenir Tourism; h) Golf Tourism; i) Pilligrimage Tourism; j) Legend Tourism; k) Heritage Tourism; l) Music Tourism; m) Strawberry Tourism

Mizoram

The natural resources, climatic conditions and policy incentives in the state support investments in bamboo, sericulture, tourism, agro-products and agro-processing sectors. With its highly green hills, crisscrossing rivers, and interspersed lakes, Mizoram is a tourist's paradise. Under the 12th Five-Year Plan, Mizoram has 11 ongoing tourism projects with a sanction of US$ 7.7 million from the Government of India.

Between 2004-05 and 2015-16, Gross State Domestic Product (GSDP) expanded at a Compound Annual Growth Rate (CAGR) of 11.1 per cent to US$ 1.91 billion whereas the Net State Domestic Product (NSDP) expanded at a CAGR of 10.56 per cent to US$ 1.63 billion. The tertiary sector, the largest contributor to Mizoram's economy, witnessed growth at a rate of 16.24 per cent during 2004-05 to 2015-16; driven by trade, hotels, real estate, finance,

insurance, transport, communications and other services. As part of its Vision 2020, Mizoram has set an objective to Focusing and developing services that would promote tourism and create employment opportunities in the state.

Creation of tourist complexes, adventure sports and resort facilities, amusement parks, health farms, hotels, convention centres, tourist travel services, etc., offer various avenues for investment in the tourism sector of Mizoram. Some of the wild life sanctuaries and national parks in the state are: Ngengpui Wildlife Sanctuary, Phawngpui National park, Thorangtlang Wildlife Sanctuary, Lengteng Wildlife Sanctuary, Khawnglung Wildlife Sanctuary, Blue Mountain National Park and Murlen National Park.

Around 44,702 tourists visited the state during 2015-16, till November 2015. An amount of US$ 8.1 million was sanctioned by the Union Government for the state of Mizoram in 2014-15 for three projects related to Product/Infrastructure Development for Destinations and Circuits (PIDDC), IT and rural tourism (RT) as well as fairs and festivals.

During FY16 (upto January 2016), tourism sector of the state recorded revenues of US$ 0.27 million, on account of various efforts of the state government to attract tourists. The state also organises three festivals – Chapchar Kut in March, Anthurium Festival in September and Thalfavang Kut in November-December, in order to attract more tourists to the state. During 2015-16, US$ 7.38 million was released by the Government of Mizoram for promoting growth of Integrated Development of Eco-Tourism Mega Circuit in Mizoram. During 2015-16, the state sanctioned a sum of US$ 1.22 million for the development of Theme Park & Eco Tourism in Lungleng. A sum of US$ 0.76 million was also sanctioned for the development of Chalfilh as a tourist destination, during 2015-16. In November 2016, Government of Mizoram drafted Eco-tourism policy to promote eco-tourism in the state. The policy seeks to turn the state into a tourist destination popular for its flora and fauna.

Nagaland

Ministry of Tourism, Government of India, has included 12 villages in Nagaland under the rural tourism scheme in order to promote traditional rural art, craft, textile and culture. The state offers excellent policy and fiscal incentives for agro-based and forest-based industries, horticulture, food processing, mining, tourism, and handlooms and handicrafts sectors.

Nagaland is home to 16 different tribes. Each tribe has its own weaving techniques, unique designs, colours, costumes and accessories. The tribal and war dances of the Naga people are unique to each clan and form an important part of their culture. The customs and traditions of the Nagamese are intertwined with their agricultural cycle and festivals.

The annual Hornbill festival is a festive showcase of the rich culture and tradition and is celebrated for seven days in the first week of December. Other festivals include Sekrenyi, Moatsu, Sukhrunhye Tsukhenye, Naknyulem, Tsokum, Mimkut, Bushu, etc.

Tourist locations in Nagaland include Tizit, Chumukedima, Piphema, Zanibu Lake, Shilloi Lake, Dimapur, Kohima, Mokokchung, Longleng, Mon, Peren, Phek, Tuensang, Kiphire, Wokha and Zunheboto.

In September 2015, a second instalment worth US$ 0.32 million was sanctioned by the state government for the construction of Rani Gaidinliu Library cum Memorial Museum in Kohima.

As per state budget 2016-17, US$ 4.3 million has been allocated by Government of Nagaland for the enhancement and development of sports, art & culture and education sectors of the state. During November 17-19, 2016, Directorate of Art & Culture organized 'Art Ensemble' to facilitate interaction among artists of various disciplines and to exhibit their works in Kohima. About 64,616 domestic tourist and 2,769 foreign tourists visited the state in 2015. Creation of tourist complexes, eco-tourism, adventure tourism, ethnic culture tourism, health farms, hotels, convention centres, tourist travel services, etc, are various avenues for investment in the sector.

During 2015-16, under the Tribal Circuit theme of Swadesh Darshan scheme, an amount of US$ 14.87 million was sanctioned and US$ 2.97 million has been released by the central government, for the development of tourism in the country.

Sikkim

Sikkim constitutes 0.22 % of the total geographical area of India. It extends approximately 114 km from north to south and 64 km from east to west with altitude ranging from 250 to 8598 mts. Sikkim is surrounded by vast stretches of Tibetan Plateau in the North, Chumbi Valley of Tibet and the kingdom of Bhutan in the east, Darjeeling district of West Bengal in the south and the kingdom in Nepal in the west. The summit of the Kangchenjunga is the highest point which falls on the border between Sikkim and Nepal.

The climate ranges from sub-tropical in the south to tundra in the northern parts. The tundra type region in the north is clad by snow for four months a year and the temperature drops below 0 °C. Most of the inhabited regions of Sikkim witness a temperate climate, with the temperatures seldom exceeding 28 °C (82 °F) in summer or dropping below 0 °C (32 °F) in winter. Sikkim is connected to rest of the country by air through its newly developed Pakyong Airport. New Jalpaiguri and Siliguri is the two rail stations nearest to Sikkim located in West Bengal. National Highway 31A connects Gangtok with Siliguri and this national highway runs through picturesque lush green forests along the bank of river Teesta on one side and sky touching mountain ranges of Eastern Himalaya on other side.

Sikkim has much to offer all her visitors. From popular home stays where one can get a first hand experience of rural Sikkim to endless possibilities for adventure sports. From ancient monasteries and flamboyant festivals to all the amenities of the modern world. The State is naturally gifted having all sorts of destinations and circuits required for the tourists. Tourism in Sikkim has impressive varieties of Tourism Products, some of them are:

- Organic, Green and Pollution Free State
- Very rich Culture, traditions, heritage and strong commitment
- Eco-tourism & Wildlife
- Village Tourism
- Adventure Tourism
- Wellness, Health, Yoga, Herbal and medical tourism

- Religious, culture, Heritage and pilgrimage Tourism
- Conference Tourism

The mighty and majestic mountains, green valleys, wilderness & sense of adventure, delightful cuisines, peaceful and crime free State, Hot spot of biodiversity and a mixture of things that would make any place on the earth a delight to visit, has made Sikkim the hot destination for Tourism that it should be. Virtually unexplored, offers unique opportunities in almost all the major aspects of Tourism. The State Government in the past years have given top priority and importance for development of sufficient and required infrastructure for the development of tourism in the State.

Tripura

With its pleasant climate and scenic landscape, Tripura is a favoured tourist destination. The state offers tourists attractions such as historical Hindu and Buddhist sites, temples, rivers and rock carvings. The number of foreign tourists visiting the state grew at a compound annual growth rate (CAGR) of 50.4 per cent from 2010-11 to 2014-15. It is blessed with scenic beauty, ancient places, temples, breathing taking verdant hills and bio-diversity treasure trove of wildlife sanctuaries. Under its Vision 2020, the state plans to focus and develop services that would promote tourism and create employment opportunities. Improving the security scenario for safety of tourists.

Tripura is an attractive tourist destination with a rich cultural heritage. There are number of historical Hindu, Buddhist sites. There is also great potential for development of tourist circuits, involving all the north-eastern states and Bangladesh. This offers attractive opportunities for the Hospitality Industry. Music is an integral part of the lives of tribal people. There are 19 tribes in Tripura that contribute to its cultural variety. In the state, a week-long festival named “Kharchi” is celebrated with a lot of splendour and vivacity. Most fairs and festivals celebrated during the year are related to harvest seasons and are an integral part of the state’s culture. Some of the festivals are Ashokastami Festival, Garia and Gajan Festival, Orange and Tourism Festival, Kharchi Festival, Rash Festival and Pous Sankranti Festival. Tripura is noted for bamboo and cane handicrafts.

The state has a huge potential in tourism, specially eco-tourism, religious tourism, heritage tourism, hill tourism, rural tourism, archaeological tourism and water tourism. Over the years, there has been a gradual increase in the number of foreign tourists visiting the state. The number of foreign tourists grew at a CAGR of 50.4% from 2010-11 to 2014-15. Tripura’s tourism department recorded revenues of US$ 251.01 thousand during 2014-15, which was less than US$ 313.98 thousand during 2013-14.

During 2016-17, the state government would initiate the work on Destination Development project of Golaghati, Narikel Kunj, etc. as well as the Light and Sound Show in Agartala through ITDC.

Contribution of Tourism in NER Economy

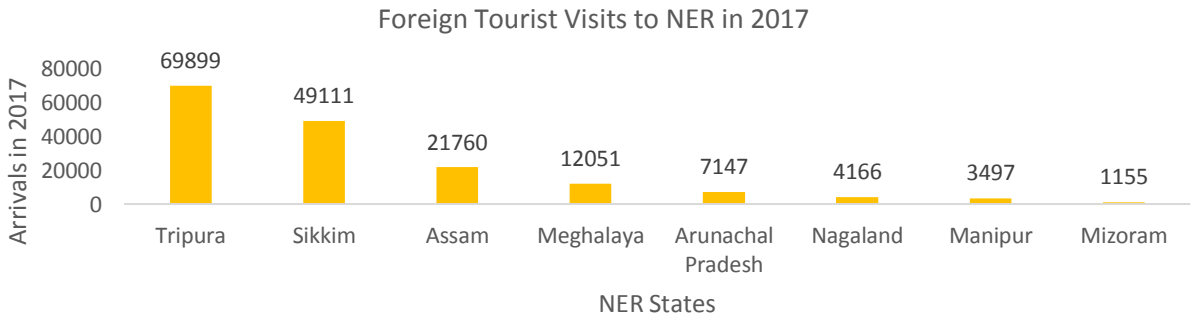
Tourism in India is a growing industry, and as per World Tourism Organisation predictions, India will be a leader in using tourism as an employment generator. The states must be placed in a strategic position to take advantage of this growth. Tourism being a multi sectoral activity has the capacity to stimulate different sectors of the economy. It is evident from highly developed states and countries that tourism opens up immense opportunities for economic development, poverty alleviation and income generation. Being labour intensive, it opens avenues for a host of employment opportunities. Tourism can also make a positive impact on conserving the environment, cultural enrichment, development of rural areas and empowerment of women.

Tourism has emerged as one of the prospective sectors of industry in the Northeast. The economic development of NER has been greatly influenced by the tourism. The growth of tourism industry over the years has nourished and stimulated the development process. The tourism industry has also been able to generate large scale employment opportunities and the development of the region as a whole.

Tourist inflow into the NE states has grown consistently over the previous decade. Domestic Tourist Arrival has grown from 3.13 mn in 2003 to 9.94 mn in 2017 displaying a CAGR of 8% during the period. Domestic Tourist inflow in Assam in 2017 was the highest amongst the 8 NER states at 6.05 mn domestic tourist visits, followed by Sikkim, Meghalaya and Tripura.



Foreign Tourist Visits in NER is estimated to be 0.16 mn in 2017. Tripura followed by Sikkim and Assam are the most favoured states by foreign tourists in NER.



However, with only 0.57% share of domestic tourist visits and 0.63% share of foreign tourist visits of the country in 2017, NER states occupies very low ranks amongst the 29 states and 7 UTs.

NER States	National Ranking (Domestic Tourist Visits, 2017)	National Ranking (Foreign Tourist Visits, 2017)
Tripura	32 of 36	23 of 36
Sikkim	26 of 36	24 of 36
Assam	22 of 36	26 of 36
Meghalaya	27 of 36	28 of 36
Arunachal Pradesh	31 of 36	29 of 36
Nagaland	35 of 36	32 of 36
Manipur	33 of 36	33 of 36
Mizoram	34 of 36	35 of 36

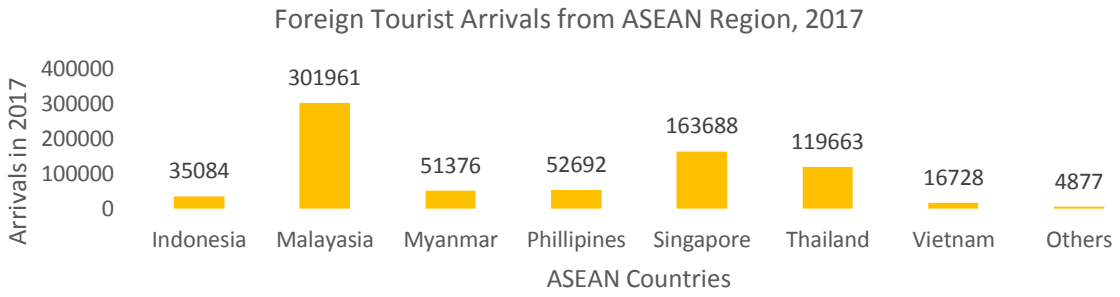


ASEAN and BBIN connect in Tourism

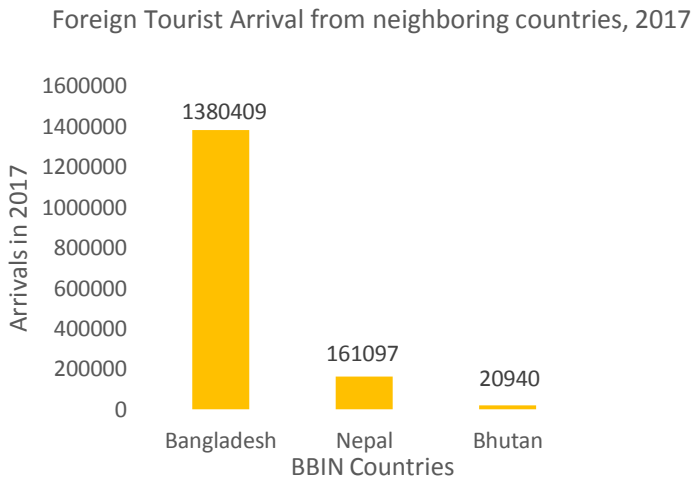
NER has an estimated 45 million population and is surrounded by around 4500 km of the International border with Bangladesh, Bhutan, China, Myanmar, Nepal. The region possesses immense potential in India's relation with South Asian countries and organizations like ASEAN. It is connected to the mainland India by a 22km wide link known as Siliguri corridor (chicken neck). Northeast is considered as a gateway for India to trade with Southeast Asian countries. The distinct geographic position, surrounding international border and proximity to the ASEAN (Association of Southeast Asian Nations) countries can help in transforming the north-eastern region into an economic and tourism corridor connecting the ASEAN countries.

- The strategic position of the northeast is an advantage for the region to become a key player in India's Act East Policy by partnering with ASEAN countries.
- Northeast India due to its critical geographic location is considered to be the bridge between two sub-regions of Asia-South Asia and Southeast Asia.
- Northeast region has a special advantage over other parts of the country in trade with India's eastern neighbours through INDIA-ASEAN Free Trade Agreement (FTA).

Foreign Tourist Arrival from SE Asian countries in India in 2017 was 7,46,069. Within SE Asia, Malaysia followed by Singapore and Thailand has been the major source of foreign tourist in India.



South Asian Countries of Bangladesh, Bhutan and Nepal together recorded FTA 1.56 mn for the same period.



NER region is strategically placed to act as a land bridge between mainland India and the ASEAN countries because of its geographical connect. The infrastructure projects such as Asian Highway 1 and 2, connecting Asian countries, passes through the NE region of India. The AH Network (namely AH 1) overlaps at several stretches within the NER Road Corridor identified earlier in this section. These stretches include Shillong–Guwahati, Guwahati–Nagaon, and Dimapur–Imphal. Moreover, AH 1 overlaps with the stretch from Imphal to Moreh, a route identified for development under the IMT motor vehicle agreement. Hence, there lies a great opportunity for increasing NER's terrestrial tourism with ASEAN and other border countries.

Apart from road infrastructure, one of the major initiatives to increase rail connectivity in the NER is to connect all the state capitals in the region with a broad-gauge line. The project has been initiated by Indian Railways and is due to be completed by 2020.

Air connectivity is important since more than 85 per cent of foreign tourist arrivals come through airways. However, the number of monthly flight arrivals in the NER is below India's average. NER has 12 operational airports including the newly developed Greenfield airport in Pakyong, Sikkim, the 100th operational airport of India. Government of Assam, under the central government's Look East Policy, has envisaged to make the Guwahati Airport hub of air traffic emanating from and to ASEAN region and India.



FLIGHT DISTANCE FROM GUWAHATI (IN KMS)	
SYLHET	156
THIMPU	248
DHAKA	303
KOLKATA	525
MANDALAY	662
KUNMING	1107
YANGON	1126
VIENTIANE	1447
NEW DELHI	1500
HANOI	1547
HYDERABAD	1671
BANGKOK	1680
CHENNAI	1885
AHMEDABAD	1961
MUMBAI	2071
PHNOM PENH	2133
COLOMBO	2482
KUALA LUMPUR	2772
SINGAPORE	3319
JAKARTA	3929

The Government of Assam recently signed a MoU with the Union Ministry of Civil Aviation and AAI under the RCS. Under the RCS, Central Government shall provide 90% share of VGF (Viability Gap Funding) to Assam. The state government has proposed enhancing the frequency of flights connecting the NER state capitals, and extension of the RCS purview to cover routes connecting the region to Kunming, Yangon, Mandalay and Dhaka, while initiating flights from Dibrugarh to Bangkok and Singapore, and resuming the Silchar – Delhi route.

With states like Assam envisaging a hub of air traffic emanating from and to SE Asian markets like Singapore, Cambodia, Thailand, Malaysia etc., Tourist Arrivals from these countries is expected to boom in the NE Region.

Policy Initiatives

Arunachal Pradesh

The state of Arunachal Pradesh has come up with the 20 year perspective plan on tourism, but never went ahead to initiate and implement it at state level. The perspective plan identifies the following Strength, Weaknesses, Opportunities and Strengths of Arunachal Pradesh.

Strengths

- Arunachal Pradesh has a rich inventory of world class tourism resources, both natural as well as manmade which include picturesque landscape, large forest areas, beautiful mountains, lakes, springs- and waterfalls.
- Arunachal Pradesh is called the Power– House of the North– Eastern States with highly significant power production. The total hydropower potential available in the state is estimated to be 30000 MW, which is one third of the entire hydro potential of the country (84,000MW).

Areas of Improvement

- Inadequate marketing of tourism products of Arunachal Pradesh
- Deficiencies in infrastructure especially connectivity and accessibility

Opportunities

Arunachal Pradesh has enormous potential for development of new product ideas, some of which are the latest craze in the western world today.

- Heritage Tourism: The state has an abundance of historical places, Religious Places, Archeological Sites and forts which can be suitably renovated and opened up for tourism.
- Health Tourism: Arunachal Pradesh is rich in plants having medicinal values.
- Entertainment Tourism: Arunachal Pradesh have a great potential for features like; entertainment complexes such as amusement parks, water parks, cable car rides, aquariums, casinos, sound and light shows, etc
- Adventure Tourism: Arunachal Pradesh has significant potential for water sports (wind-surfing, water skiing, sailing, crocodile dandies, etc), para-gliding, river rafting, scuba diving, etc and trekking, mountaineering.
- Cultural Tourism: Arunachal Pradesh has rich cultural heritage which is exhibited through the various fairs and festivals and dances.

Threat

Being location in isolation in terms of development, the State is facing challenges, which directly and indirectly curb the growth of tourism. The existing infrastructure, safety & Security, local awareness and others are the major hindrance for the development of the tourism in the State.

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

of cultural identity, awareness programmes for local commitment to the project. The tourism plan has placed objectives as:

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

Assam

Tourism has always remained a priority for Government of Assam. The first tourism policy of the State was announced in 2008 underlining the importance of Public Private Partnership which has considerably increased the tourist footfalls to the place.

The new tourism policy, under the brand "Awesome Assam" aims to promote the state as an all-seasons destination and increase the tourist inflow two to three fold in the next five years.



Tourism Policy 2017 – Key Highlights

Act East Policy	**Collaboration with neighbouring & other South East Asian Countries.**
Responsible Tourism	Preserving environmental eco-system keeping with Sustainable Development Goal
Skill Development	Skill development will be a focus area and schemes such as Hunar Se Rozgaar Tak and Skill India shall be leveraged to train the youth in Hospitality and Tourism sector.
Safety & Security of Tourists	Tourist Police, 24x7 Helpline for safety & security of tourists
Public Participation	Popularising local & Community hosts to promote bed & breakfast
Public Private Partnership	Encouragement to private players for investment in tourism infrastructure.

Standardisation & Certification	Assessment of destination quality through customer satisfaction survey Minimum standards for tourism services & incentives for ensurers
Recognition	Annual Recognition & award for tourism entrepreneurs and service providers

Incentives:

- Film tourism: Financial grant to Hindi cinema makers to the tune of Rs 1 crore per film if more than 50 percent of it is shot in the state. If the film storyline is based on Assam's culture, tourism and heritage as central theme additional Rs 25 Lakhs grant will be given. Another Rs 10 lakhs grant will be given if the post-production work is also done in Assam. For regional film-makers, the grants shall be admissible at the rate of 25% of the Hindi cinema makers.
- Grant-in-Aid: Private entrepreneurs, societies and NGOs are eligible for assistance for organizing fairs & festivals
- Free counselling at Tourism Incubation Centre of ATDC for promotion of tourist business and entrepreneurship
- Fees Reimbursement shall be provided to trainees for select hospitality courses
- Residential Electricity rates shall be ensured for Bed & Breakfast and Home-stay schemes
- VAT/SGST reimbursement: For new units with minimum investment of Rs 50 Lakhs in the notified Tourist locations, reimbursement of VAT up to 25% of tax paid during the financial year subject to a ceiling of Rs 20 Lakhs annually. (New units include river cruise, transportation services, any tourism product to be considered as such by the Government)
- Luxury Tax reimbursement: For new hotels with minimum investment of Rs 50 Lakhs in the notified Tourist locations, reimbursement of luxury tax upto 25% of the tax paid during financial year subject to ceiling of Rs 20 Lakhs
- Capital investment subsidy at the rate of 30% of capital investment subject to a ceiling of Rs 1 crore shall be available for Tourist lodges, Hotels, Resorts, Houseboats and Floating Restaurants below two star categories and located in tourism areas
- Power incentives: 25% of cost of drawing power line, exemption of alternate power generation charges, reimbursement of 25% of investment in renewable power generation.
- Infrastructure subsidy: 75% of the cost of construction of approach road to the premises of eligible units shall be reimbursed in the form of a subsidy subject to a ceiling of Rs 10 lakhs
- Location based incentive: Private Sector will be encouraged to proactively participate and invest in tourist places in the Tourism Sector. A special incentive will be offered as additional 10% capital grant up to Rs.25 lakhs for investment in remote/potential tourist destination of Assam
- Amusement Tax Exemption: Amusement and Entertainment tax will be exempted for River Cruise tourism projects

Manipur

Manipur is strategically located in the North-eastern corner of India bordering Myanmar. Nestled in the foothills of the Eastern Himalayas, the state is considered the Gateway to South East Asia**.**

The State has a rich cultural past dating back to centuries. It is the birthplace of Raas Lila- a renowned form of classical dance which was created by Maharaja Bhagyachandra. Manipur is also the birthplace of modern Polo and the locals call this game 'Sagol Kangjei'. It is a land of festivals and almost every month the people of Manipur get together to celebrate various festivals which reflects its rich culture, traditions and religious practices. **Yaoshang, Gaan Ngai, Cheiraoba, Lai-Haraoba, Kang, Heikru Hidongba, Kut, Ningol Chakkouba, Mera Houchongba and Lui** Ngaini are some of the festivals celebrated by different communities in the state. Under the Manipur Tourism Policy, 2014, Government of Manipur has identified Niche tourism products related to the special interests of tourist target markets, like;

- Nature/Eco-tourism
- Cultural Tourism
- Medical Tourism
- Adventure Tourism
- MICE Tourism

Government of Manipur has clearly drafted out an Action plan to achieve the following policy objectives:

- Foster understanding between people.
- Create employment opportunities.
- Bringing socio-economic benefits to the people of Manipur.
- Strive towards balanced and sustainable development; and
- Preserve, enrich and promote State's cultural and natural heritage.

Meghalaya

Meghalaya the "Abode of the Clouds" with its picturesque landscape of rolling hills, meandering rivers, cascading waterfalls, lush forests, diverse flora and fauna and unique culture and tradition has great potential for development of tourism. During the last few years, Meghalaya has evolved as a fast growing destination for both domestic and international tourists.

The Meghalaya Tourism Policy 2011 envisages to position Meghalaya as a preferred tourist destination by taking advantage of its rich cultural heritage and natural beauty.

The Department of Tourism will provide incentives to entrepreneurs for new projects in the Tourism sector for infrastructure development. The incentives will be subsidy limiting the amount to 30% of the project cost for approved projects within the amount of Rs 1.00 Crores to 1.50 Crores.

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

The Tourism Department will provide incentives to registered house owners who are willing to provide Hospitality in the form of Bed 'n' Breakfast in all the prominent tourist destinations.

Such owners shall initially be trained and should be willing to provide the basic amenities identified by the Department.

Mizoram

The state of Mizoram, endowed with numerous beautiful hill ranges covered with forest, rivers and streams between the hills, coupled with its rich natural and cultural heritage provides unique opportunities for ecotourism. Mizoram has about 88.93% of its land covered with forests (SFR 2015) that supports various species of mammals, birds, reptiles, more than 2500 species of plants including 253 species of orchids (BSI, Shillong) and more than 300 species of medicinal plants. The rich biodiversity of the state is conserved mainly through a network of protected areas comprising of 2 National Parks and 8 Sanctuaries complemented by wilderness areas, community conserved village forest areas, wetlands and other forest areas.

The vision of the Eco Tourism Policy 2017 is to preserve and protect the natural heritage, both flora and fauna of Mizoram and attract tourists and visitors from outside and inside the State through low impact community based ecotourism; and in the bargain provide opportunities to enhance livelihood of the local people and at the same time generate revenue for the sustainable development of its resources.

According to the Policy following are some of the activities and facilities that Government of Mizoram envisages to undertake for promoting an area as an ecotourism destination in Mizoram.

Activities

- Trekking and Nature Walks.
- Wildlife spotting and Bird watching
- Angling
- Adventure sports like rock climbing, rappelling, parasailing, boating, river rafting, etc
- Nature photography tour
- Nature painting workshop
- Botanical excursion

Facilities

- Nature Camps including day visitor centers.
- Eco-friendly Accommodation including home stays.
- Visitor Interpretation Centers and Nature Education
- Amphitheatre.
- Nature shops.
- Herbal Ecotourism with sale outlets.
- Urban ecotourism through eco-parks.
- Wayside amenities like public conveniences, garbage disposal facilities, observation towers with telescope and binoculars, adequate signage, wayside exhibits, etc.

Nagaland

Nagaland's tourism resources are immense. Natural beauty in its varied forms is the state's major asset. Lush green vegetation having interesting flora and fauna, deep valleys with glistening streams, natural lakes, hill agriculture and pleasant climate throughout the year are

unique natural features of the state. Additionally, its history, ethnic tribal culture reflected through folk dances, music, festivals, handicrafts and the mysticism associated with the customs and ways of its hill tribes has been the source of great curiosity to not only Indians but people all over the world. It is a land of charm, diverse in landscape, culture and offers opportunities for whole range of tourism activities, which to date has remained largely untapped.

The Nagaland Tourism Policy state the following objectives:

- To provide a planned development of tourism based on promotion of domestic and international tourism.
- Identification of tourist potential areas and development of these resources and strengthening of the existing and viable infrastructures on a selective and intensive basis for maximum benefit to the state economy.
- To prepare and implement a master plan for integrated development and marketing of identified circuits.
- To create and provide necessary infrastructural facilities such as power, water, roads, transportation, accommodation etc. for development of tourism in the state.
- To improve, diversify and expand the marketing of tourism products in the state.

Under the State Industrial Policy of Nagaland 2000, Tourism has been accorded the status of "Priority Sector". Accordingly, Government orders will be issued making tourism activities eligible for all benefits to the industry. Only such units which comply with the prescribed norms of recognition and whose projects have been approved by the department would be eligible for these benefits, as contained in the State Industrial Policy of 2000, in area of central subsidy for small and medium scale sector, transport etc., and the state subsidy on power generation and power tariff, water supply, tax exemption etc.

Sikkim

Sikkim is a wholly mountainous, with one third of its area lying above 3,000 meters, of which a large portion is covered by snow-capped peaks, glaciers and alpine meadows. This natural steep topography is a determining factor for the state vis-a-vis land-use pattern, connectivity issue, and infrastructure development. Tourist arrivals in Sikkim have seen unprecedented growth in the last three decades. From a mere 15,000 tourists in 1980 to a whopping 14,24,965 tourists in 2017. Foreign tourist growth has shown an annual growth rate average of 8% from 2005 to 2013.

The Sikkim Tourism Policy 2018 envisages to become a highly valued responsible tourism destination with tourism contributing significantly to the State economy while conserving its natural and cultural heritage. To address the policy goals of promoting cultural and natural heritage of Sikkim for developing high value low impact tourism in the State the key products are proposed as

- Conventional leisure based tourism
- Nature based tourism or Ecotourism
- Adventure based tourism
- Culture based tourism & village homestays
- Religion based tourism
- MICE (Meetings, Incentive Events, Conferences and Exhibitions)
- Health and Wellness tourism

Tripura

Tripura is endowed with splendid natural beauty. The state, an abode of rich floral and faunal biodiversity, treasure of plants, shrubs and herbs of medicinal value, unique ecosystems, wet lands, their grandeur and awe inspiring beauty are the source of perennial attraction. The verdure expanse of undulating landscapes intermittently adorned with water bodies and rivers accommodates unique amalgamation of cultures of nineteen tribes. The state has over 68% is under protected areas in the form of four wildlife sanctuaries.

The Eco Tourism policy of Tripura, 2004 envisions to make Eco-tourism as major resource earner for Tripura in the span of 10 years.



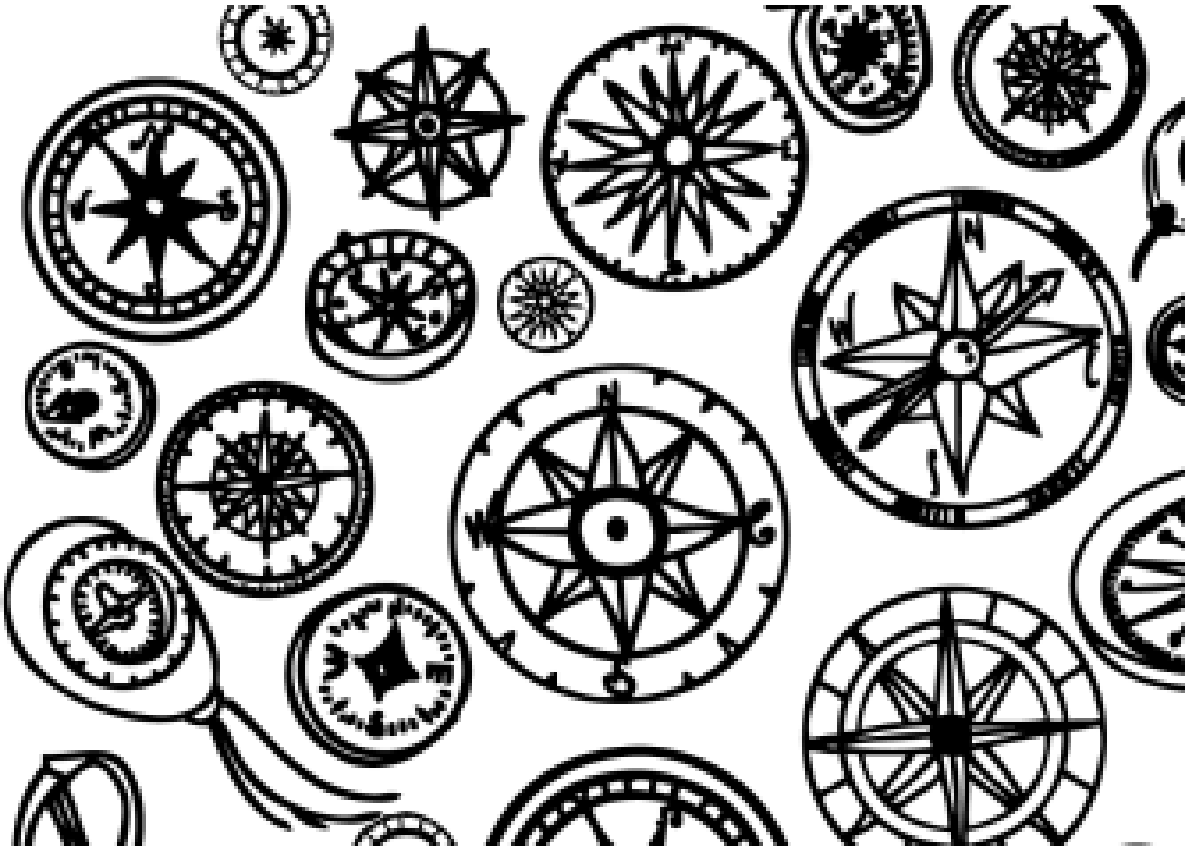
Developmental Challenges

Development of Tourism Industry in North Eastern States – Key Challenges:

North eastern states have a mix of interesting offerings as tourism products. These offerings have the potential to cater to different categories of tourist market; namely, eco-tourism, culture tourism, and religious tourism, adventure tourism, Religious tourism, wellness tourism etc. However, the tourism potential of these states are yet to realize their full potential. There are many factors which impede the growth of tourism in these region. Some of the major challenges faced by the tourism industry in N.E Region are as under:

- **Connectivity:** Lack of proper connectivity infrastructure is a major deterrent for growth of tourism industry in the N.E states. Absence of fast and seamless mode of travelling is a major concern for travellers travelling on tight schedules. Major part of the terrain in these States are hilly which makes these state dependent on road network, which has to be particularly good to ease transportation and reduce time to travel. Further, the number of airports in these region is very few. Again the connectivity from these airport is very limited. Thus the tourist have to depend on road network for reaching the tourist destinations which makes accessibility time-consuming for the inbound tourists travelling long distances. Most of the connectivity infrastructure projects in the region are delayed in implementation, causing development lags. Infrastructure development in terms of better road connectivity, accessibility, and a proper distribution of connectivity infrastructure are critical to growth of tourism in the N.E region
- **Entry Permits** and movement restrictions in border and protected region are applicable across few states and certain pockets in these region which makes it difficult for the independent travellers to make self-arrangements for travel. At times the tourists lose their valuable time in obtaining these entry permits. Thus, it becomes difficult for the tourists to cover multiple tourist destinations
- **Tourism Infrastructure**: There exists limited tourism infrastructure facilities across all the N.E states, particularly in terms of quality and experiential/ interpretational facilities and site services and most of the tourism destination do not have the minimum basic facilities. There are fewer accommodation facilities at most places throughout the north eastern states. Existing lodging facilities are insufficient to cope with the increasing demand, do not cater to high spending tourists, and are of poor quality.
- **Security concerns in certain pockets**: The development of N.E region has not kept pace with that of other parts of the country. Also there are territorial disputes amongst various communities, border disputes between States and neighbouring countries. As a consequence of which, many insurgent groups were active in these regions. In the past there have been incidents which have raised serious security concerns. Many of the foreign countries have advisories issued to their citizens which asks them not to visit north eastern states or certain pockets of N.E region
- **Non-availability of manpower**: Owing to insurgency and limited economic activity in these regions, there is a migration of the local population to bigger cities for jobs. Also there are geographies where population density is very low. This has led to a scarcity of skilled as well as unskilled labour in most of the state. There is high dependency on outstation population working in the state.
- **Negligible Private investment:** The insurgency, poor connectivity infrastructure, and lack of information has resulted in negligible participation of private players in development of tourism industry in the N.E region. Majority of the tourism and hospitality infrastructure in these states are government funded. In order to expedite the growth of tourism in the region, participation of the private industry leaders is a must

- **Inadequate marketing and promotion**: N.E region still continues to be a mystery for the investors operating in other parts of the country. In general, the investors are not aware of the tourism potential of N.E states. Also, the people are apprehensive of the law and order situation in these states. Hence it becomes essential that, these states focus on improving the visibility of tourism potential of the region by participating in various tourism conference and seminars. This will educate the investors and the tourist, regarding tourism potential of the region. Additionally, these states must regularly organise various cultural meet, adventure camps, tourism festival etc to promote their tourist locations and to build the investors' confidence
- **Lack of co-ordination and alignment of tour operators in N.E region and other States**: Most of the tour in N.E states are working in silos. The operators in these regions need to be organised and work in line with their counter parts in other states, in order to improve the tourist experience in the region. Government support would be necessary in training and development of professionally organised tour operators in the region



Approach to Development of Tourism Industry in North Eastern Region

3. Approach towards further development of Tourism Industry in NER

DEVELOPMENT OF NEW TOURISM CIRCUITS IN NORTH EAST

Tourist surveys conducted over India, indicated that most tourists prefer to visit more than one type of destination while on vacation. Therefore, the strategy underlying the development of circuits is to provide varied experiences (secondary interests) to tourists around a central theme (primary interest). In order to exploit the mix and variety of sites in the North Eastern region tourism circuits should be designed. These circuits can be formed through conjunction of sites, in order to offer the tourist a complete tourism experience.

Entry Point as Guwahati

1. **Guwahati- Shillong- Nongstoin- Balpakram National Park-Tura- Guwahati**

States: Assam and Meghalaya
Circuit Theme: Eco-tourism, Caving
Days: 5-6 days
Significant Attractions: Include the river island of Nongstoin, Siju Caves, Nokrek Biosphere Reserve,Tura Peak etc.

2. **Guwahati- Manas- Tura- Balpakram National Park -Nongstoin- Shillong- Guwahati**

States: Assam and Meghalaya
Circuit Theme: Eco-tourism, Caving, Wildlife
Days: 8-10 days
Significant Attractions: Manas National Park, Nokrek biosphere reserve, Balpakram National Park, Shillong, etc. Significant attractions enroute include the river island of Tura Peak, Siju Caves, Nongstoin, Mawphlang Sacred Forests etc.

This is a new long circuit proposed for Eco tourists with keen interest on National Parks and Biosphere Reserves, along with hill stations like Shillong.

3. **Guwahati- Kaziranga- Majuli- Namdapha**

States: Assam and Meghalaya
Circuit Theme: Eco-tourism, Caving, Wildlife
Days: 7-8 days
Significant Attractions: National Parks like Kaziranga, Namdapha and Spiritual attractions like Majuli**.** Additional attractions enroute include Sibsagar, Tea tourism at Jorhat/ Dibrugarh etc. This is a specialised eco-tourism circuit with two very eco sensitive regions in same circuit.

Entry Point as Itanagar/N Lakhimpur

4. **Itanagar/N Lakhimpur – Ziro – Aalo – Mechuka – Aalo – Pasighat Biking Circuit**

States: Arunachal Pradesh
Circuit Theme: Biking, Rally Tourism
Days: 7-8 days
Significant Attractions: This is a newly proposed Biking Circuit. Bikers may hire bikes on rent in Itanagar/Lakhimpur and ride upto Mechuka Village and return to Pasighat.

Government of Arunachal Pradesh may organise an annual biking rally in lines with Raid De Himalaya organised annually between Himachal Pradesh and Jammu and Kashmir. Raid De Himalaya is a motorsport started in 1999. It is the world's highest rally raid.



5. **North Lakhimpur/ Itanagar- Ziro- Daparijo- Along- Pasighat- Roing- Tezu- Dibrugarh**

States: Arunachal Pradesh
Circuit Theme: Nature, Eco Tourism
Days: 9-10 days
Significant Attractions: Various villages nearby Ziro, Daparijo, Along, Pasighat, Roing, Tezu or destination Mechuka

Entry Point as Dibrugarh

6. **Dibrugarh- Likhabali- Along- Mechuka- Pasighat-Dibrugarh**

States: Assam and Arunachal Pradesh
Circuit Theme: Biking, Rally Tourism
Days: 6-8 days
Significant Attractions: Along is the main tourist destination-and a standalone circuit. The tourist will have a choice of Likhabali (Malinithan) or Pasighat to get to Along

7. **Dibrugarh- Likhabali- Parasuramkund- Sibsagar- Jorhat**

States: Assam and Arunachal Pradesh
Circuit Theme: Religious and Tea Tourism
Days: 5-6 days
Significant Attractions: This new circuit is for religious/ heritage/ general tourists. Malinithan at Likhabali is where Lord Krishna is believed to have married Rukmini devi and there are few temples here. Parasuramkund is a very revered spot attracting several tourists around Makarsankranthi. The location here is among the most peaceful places in North East.

8. **Dibrugarh- Parasuramkund- Namdapha- Digboi-Dibrugarh**

States: Assam and Arunachal Pradesh
Circuit Theme: Leisure and Eco Tourism
Days: 5-6 days
Significant Attractions: This is a new circuit for general leisure tourist (mainly domestic). Parasuramkund is a very revered spot attracting several tourists around Makarsankranthi. The location here is among the most peaceful places in North East. Namdapha is one of the most attractive eco-tourism destinations.

Entry Point as Dimapur

9. **Dimapur-Kohima-Wokha-Mokokchung-Jorhat**

States: Nagaland and Assam
Circuit Theme: Cultural and Eco and Tea Tourism
Days: 5-6 days
Significant Attractions: Attractions include Kisama, Khonoma, Pfutsero hill station etc. These are already circuit where limited tourists are visiting, and which is an authentic cultural experience.

Entry Point as Silchar

10. **Silchar- Haflong-Umrangsho- Shillong-Guwahati**

States: Assam and Meghalaya
Circuit Theme: Leisure and Wildlife
Days: 5-6 days
Significant Attractions: Attractions include Halflong Hill Station, Jatinga, Lake in Umrangsho and Shillong.

Entry Point as Imphal

11. **Imphal - Loktak lake –Moreh – Imphal**

States: Manipur
Circuit Theme: Leisure and Cultural
Days: 4-5 days
Significant Attractions Loktak Lake, Border town of Moreh

Entry Point as Agartala

12. **Agartala- Silchar- Shillong- Guwahati**

States: Tripura, Assam and Meghalaya
Circuit Theme: Leisure, Nature, Medical Tourism
Days: 4-6 days
Significant Attractions: This is a circuit which has lot of potential. Tourists from Bangladesh, who may be promoted in group tours will find this as a very convenient option.

13. **Agartala- Jampui Hills- Aizawl-Imphal**

States: Tripura, Mizoram and Manipur
Circuit Theme: Leisure and Wildlife
Days: 6-7 days
Significant Attractions: Agartala city and surroundings, Jampui Hills hill station, Aizawal city and surroundings, Imphal, Loktak lake.

Entry Point as Pakyong

14. **Gangtok – North Sikkim – West Sikkim – Gangtok- Guwahati- River Cruise**

States: Sikkim and Assam
Circuit Theme: River, Leisure and Nature
Days: 15-20 days
Significant Attractions: Both legs of this circuit has lot of tourist activity at present. River Cruise of Assam offers unique cruising experience coupled with wildlife activity along the mighty Brahmaputra. At the same time, Sikkim receives a lot of foreign tourist. With recent direct flight connectivity between Gangtok and Guwahati, this circuit will attract a lot of high end tourists.

Development of international tourism circuits

Bhutan, Bangladesh and Myanmar are the neighbouring countries of North-East. Bhutan is located between Sikkim and Arunachal Pradesh and it is to the north of Assam. Bangladesh borders Tripura and Mizoram.

1. **Guwahati – Manas – Samdrup Jonkhar (entry point for Bhutan) – Trashigang – Tawang.**

Countries: India (Assam and Arunachal Pradesh) and Bhutan
Circuit Theme: Nature, Eco Tourism, Cultural Tourism, Religious Tourism
Days: 10-12 days
Significant Attractions: This circuit offers excellent possibility of blending adventure, Mountain, eco-tourism, Culture & Spirituality.

2. **Gangtok- Paro- Thimphu – Trashigang- Tawang- Guwahati**
   Or
   Gangtok- Paro- Thimphu – Samdrup Jonkhar- Manas – Guwahati- River Cruise

Countries: India (Sikkim Arunachal Pradesh and Assam) and Bhutan
Circuit Theme: Nature, Eco Tourism, Cultural Tourism, Religious Tourism
Days: 10-12 days
Significant Attractions: Air connectivity from Gangtok to Paro in future shall enable visitors to enjoy eco and river tourism offered by Assam in Manas and Guwahati respectively along with Mountain and Culture tourism products of Sikkim and Bhutan.

3. **Dhaka- Agartala- Shillong**
   Or
   Bangladesh to Meghalaya through Dawki to Shillong.

Countries: India (Meghalaya) and Bangladesh

Circuit Theme: Nature, Eco Tourism
Days: 5-6 days
Significant Attractions: There is a lot of interest in Bangladesh for Shillong hill station and Jampui hill station which will develop in future, Dhaka- Agartala- Shillong is an attractive and feasible option. Shuttle luxury tourist bus services may be held in this route. Group tourists may also be allowed easy visas.

4. Imphal - Moreh/ Tamu – Monywa/ Mandalay

Countries: India (Manipur) and Myanmar
Circuit Theme: Nature, Eco Tourism, Religious Tourism
Days: 5-6 days
Significant Attractions: This circuit opens up possibility of road trip to Mandalay for visitors going to Imphal.

Community Participation

The socio-economic impact of tourism development in the North East Region can be achieved through engaging in a partnership with the local community for tourism development and to develop human resources for the envisaged employment opportunities.

Community-based Tourism

An effective way to improve the economy in the North East region and to enable communities to improve the quality of life will be through social mobilisation of the people, especially into Self Help Groups. This will involve community participation in tourism activities such that the benefits of development are equitably distributed. This will include improved access to education/training and other social services of the community. The focus of SHGs will be to develop the capacity of the women and special groups, and to organise them, so that they can deal with socio-economic/socio-political issues that affect their lives and develop their skills to improve the household economy.

Benefits to Local Communities

Developments of tourism in natural areas provide an excellent opportunity for achieving diversification in addition to providing a wide range of benefits, both direct and indirect, to the local host community. Once people are involved in economic income generating activities out of tourism, this will also inspire people to maintain peaceful atmosphere and law and order situation.

Direct Benefits

Some of the direct benefits accruing to the local community of the region as a result of tourism development are:

- **Employment Opportunities in Tourism and Hospitality Sector:** Tourism offers employment to skilled, semi-skilled and unskilled workers, especially the local community. Employment opportunities will generated in hotels, restaurants, tea/snack shops, handicrafts (souvenir), heritage and cultural troupes, guides/heritage and nature interpreters, photographers, etc. to name a few.
- **Development of Private Enterprise:** Most of the development at local levels would have to be driven by the private enterprise which would invest in hotels/lodges, restaurants, eateries, recreational centres, information and communication centres,

handicrafts/souvenir shops, etc. Tourism development in these regions may become a significant factor in redressing regional - imbalances in employment and income. Tourist expenditure at a particular tourist area greatly helps the development of the surrounding areas.

- **Sustainable Environmental Practices:** The environment and wildlife resources are major attractions to bring in tourists in the North East region. Environmental and wildlife protection is therefore perceived as an essential component for long-term success of tourism in this region. The tourism development activities will also include increasing awareness towards the conservation of natural and cultural assets both among the locals and tourists. It is expected that through the co-operation and productive interaction of the tourism industry, environmental protectors and the local community, it will ensure a regulated tourism that will benefit all and achieve environmental sustainability in the region.

Indirect Benefits

Some of the indirect benefits accruing to the local community of the region as a result of planned tourism development are:

- **Infrastructure Development:** Development of tourism in the region calls for development of the infrastructure backbone that would support the increased tourist traffic. In addition to development of new infrastructure, the improvements in the existing infrastructure, which are undertaken in order to attract tourists, are also of crucial importance. The investment in infrastructure development, however, is not solely for catering to the tourists. The infrastructure is bound to be used by the local population and thus the improvements in infrastructure may confer benefits upon the local population by providing them with amenities. Thus, indirectly, expenditure for infrastructure development will stimulate other economic activities thereby providing more job opportunities and facilities to the local population.

- **Economic Upliftment Due To Income Multiplier Effect:** The flow of money generated by tourist spending multiplies as it passes through various sections of the economy. This can be depicted with the help of following Exhibit. It depicts how a direct expenditure of an amount of money by a tourist leads to further expenses in the economy across various layers. This ripple effect generates income not just for the primary receiver of the money from the tourist but also for the entire chain that supplies various goods and services that go into fulfilling the needs and requirements of the tourist. This phenomenon is the income multiplier effect and growth in tourism in the region would mean a higher income multiplier and hence an improved economy of the region.

- **Empowerment of Women:** Training and capacity building of Women groups/ institutions and involvement of women in tourism activities would help in empowerment of women and general improvement in their health, education, nutrition and status in the society. It has to be noted that, in general, womenfolk are hardworking, and with some training and financial help in form of micro-credit can take up active and constructive roles in development of tourism in the region and development of the region in turn.

With tourism development and availability of planned income generating activities, infrastructure and other facilities in the region, the region would become self-sufficient prompting people to stay on and take up tourism related activities; heritage and environmental conservation and this would instil a sense of belonging and accountability to the place in the people.

Marketing NER Tourism

The first step towards developing a marketing strategy is to understand the competition from the neighbouring areas and subsequently develop strategies to combat the competition.

The competitors of the North East include the northern Himalayan and other hilly areas. Many of these areas have an edge over the North East because of good infrastructural support and tourist amenities. These destinations have a well-defined brand image in the tourist's perception. These have distribution tie-ups with major tour operators and leading hotels for both the domestic and international tourists with tour operators promoting these destinations. The domestic tourists visiting these destinations also implies an increased social status.

However, North East has an advantage because of the unexplored paradise region. From an international perspective, for national parks, the tourists have better choices of African safaris and forests. Regarding cultural authenticity, there is no competition to the North East. In terms of the eco and culture as a combination, North East is superior.

The challenge will be to position differential sub-regions of North East differently from the rest of them so that all areas also invite tourists

Regional Marketing Strategy

As is evident from the observations and trend analysis of tourism patterns in India and North East, majority of the domestic tourist flows are constituted by the 'Religious' and 'Eco-Leisure' categories. These tourism categories can be further enhanced while encouraging other categories like 'Business' and 'Adventure Sports' in the domestic segment and 'Culture' tourism in the International segment.

To achieve these objectives, the following product positioning strategy is recommended:

- Position cities like Gangtok, Guwahati, and Aizawl as places providing opportunities for business seminars, conventions, and meetings. These activities can be focused on enhancing business tourist visits for the development of business in the region as well as, a place providing facilities for holding seminars and other major business meets. These initiatives need to be supported by providing infrastructure facilities like convention centers, meeting, and discussion rooms in major hotels and other incentives like discounts on hotel stays for corporate organizations.
- Explore linkages between various historical and monumental sites throughout the region and establish the legends associated with them. These legends/historical incidents can be depicted in the form of dramatics/shows at these sites. Various places of historical importance are Kangla Fort in Imphal, Manipur; Malini Than in Likhabali, Arunachal Pradesh; Krishna Satras on Majuli Island, Assam; and other similar destinations.
- Target the international segment by promoting specific culture circuits like Buddhist circuits and tribal circuits in Sikkim, Arunachal Pradesh and Nagaland
- Target the domestic and international youth segment by promoting and holding youth oriented events like rock shows and musical competitions. These events can be accompanied with some prize money and awards or recognition for the performers.
- Offer off Season Packages and Special Interest Packages for tourists belonging to the Visiting Friends and Relatives (VFR) category and intra North East travellers. Many tourists who are visiting friends and relatives in North East have time to visit destinations. However, they may have already visited the nearby tourist destinations. Special packages

may attract them to these sites again. Innovative off-season packages that attract tourists could result in income-generation opportunities for the local population all-round the year.

Target Market

Market segmentation represents an effort to increase the targeting precision. It can be carried out at the level of segments, niches, local areas, and individuals.

To develop a marketing strategy, it is very essential that an analysis of the consumer markets be done. This helps to comprehend the nuances of how various market segments react to a marketing mix like channels of distribution, promotion, products, and services available and their relative price.

Category 'A'

This is a category which has already started showing interest in the existing tourism products of North East but the concentration has been on certain pockets of the region only. The segment provides excellent growth potential. Thus, it is recommended that this segment be exposed to the highest media coverage and promotion activities to boost further positive buying behaviour. The key here is to promote the destinations that have similar potential as the destinations that are currently preferred by this group.

Category 'A' Domestic Market

In the domestic market, the Category 'A' is divided into two parts, described as follows.

Category A.1 will constitute of West Bengal and intra North East visitation. As a first step, it will be important to promote travel between States in North Eastern Region. West Bengal will continue to be a large target segment in terms of volumes.

Category A.2 is constituted by the NCR region (Delhi and adjoining region). These travellers have shown most interest in the Eco-Nature destinations, but also an inclination towards culture tours. The average group size is 4 to 6 and the age group is 35-50. This group is characterized by medium to high spending. Their awareness level about the tourism destinations in North East is medium to high.

Category 'A' International Market

It constitutes of the following geographies, namely, Europe (United Kingdom, Germany, France and Italy) and Middle East Asia (specifically Israel). There is a growing interest in the European region in the tribal and culture tours. Tourists from Israel have visited North East India for both culture and wild life tours. This segment constitutes of tourists mostly in the age group of 25-50, travelling in groups of 3 to 5. The segment has a mix of tourists both in the business as well as service professions. This group is characterized by high spending behaviour. The awareness level about destinations in this market is low to medium.

Category 'B'

This is a category which is characterized by high travelling, high spending but is largely unaware of the potential of tourism destinations in North East or has shown low interest due to the deterrence factors like high travelling cost, and inaccessibility. The objective is to increase the awareness levels in this market segment while at the same time to provide incentives and schemes, which would influence the buying decision in favour of North East relative to other destinations. This segment represents a big chunk of the tourism market which has the potential to grow over a period of time.

Category 'B' Domestic Market

The tourists coming from Gujarat, Madhya Pradesh, Maharashtra, Rajasthan, Tamil Nadu, Karnataka, and Punjab have limited awareness about the North East circuit but are interested in Final Report Tourism Master Plan for North Eastern Region Vol 1: C.11-17 these kinds of destinations. This is the category which likes to travel in group size averaging 4 to 8 people characterized by family groups. They are medium to high spending tourists.

Category 'B' International Market

It constitutes of the following geographies, namely, North America (USA, Canada), North East Asia (Japan) and Australia. The driving factor for this segment is both the culture as well as the eco tours. The average age group is 35-60, travelling in group size of 3 to 6. This group is characterized by high spending. Their awareness level about the destinations in North East is low.

Analysing Customer Needs

For the Department of Tourism in the local administration there are two categories of customers, the tourists and the private tourism service providers and supporters (the investors - existing or potential).

The potential tourists' needs include complete product information, product variety, lesser waiting time (for information and services), and better service from channel intermediaries. Hence, the channel intermediaries should be able to provide complete information about India and the location of the tourism attractions in North East circuit. They should also be able to provide key details like travel to and within North East circuit, accommodation and entertainment facilities.

The potential tourism providers needs include complete product information, government plans for development, incentives available, and hassle-free approvals. This kind of need has to be fulfilled through one level channel, the level being the administration or the government representative.

Going Digital

Digital platforms offer global access to consumers and allow service providers to enhance the development of the tourism sector and its competitive standards. Digital technologies have the potential to give small tourism businesses in emerging destinations direct access to a global market of travel consumers for the first time, vastly expanding their prospects. To fully utilize tourism digital platforms, partnerships are key, especially ones that bring businesses to the table with governments and international organizations.

North East Tourism Website should have the following characteristics:

- Provide a user friendly interface with easily navigable links
- Provide an online booking system to book accommodation, taxi, and other modes of transport, and list of registered tour operators
- Offer detailed information on tourist attractions, hotels and restaurants, tourist facilities, tourist maps of the region, and local art and culture in the various circuits
- Provide contact information of the right people for further information through e-mail, phone, and fax. If possible, a real time online chat facility which can act as an online reception desk

Website Objective

The main objective of the North East Tourism website is to promote and facilitate tourism in the north east sector covering the North East Region as a whole and to encourage tourists not only from all parts of India but also from around the globe to experience North East region of India and thereby increase tourist influx in the North East region. A unified portal would help tourists travel in region, rather than just State wise information.

Target Audience

- Domestic tourists from all parts of India
- Non-resident Indians
- International tourists specially from Europe, US, China and South East Asian Countries
- Tourists exploring nature, different lifestyles and cultures
- Tourists interested in adventures of different regions, recreations and sports
- Tourists who are looking for relaxation
- Tourist coming for wellness
- Tourist who wants to explore different religious and pilgrim sites of the Region

Website Language

Considering global reach and with the objective of attracting foreign tourists, the website language apart from English should be in French, Spanish and other European languages, Chinese, Japanese, etc. The website should also employ Hindi and respective regional languages of each of the north east state. However the homepage and other web pages should have similar design and structure and navigation.

Search Engine Optimization

Majority of the Internet users find their intended websites/information by searching them using search engines. In any search engine if the website does not get listed atleast among the top 5 then the website is unlikely to get much traffic from that search engine. It is very important to be on top position on major search engines to get valuable traffic.

Website Security

Security features should include secure logon to the system, user registration, authentication and active session management and should include an automated E-mail / Mobile based verifications and confirmations.

E –Commerce

North East India is the home for large number of tribes and sub-tribes having rich craft tradition and excelling in craftsmanship and at the same time unique. As such the North East region produces various popular handicrafts and other indigenously built products. To enable tourists/visitors to purchase these products online through internet, the portal should be equipped with e-Shop facility which will also help in publicizing these products.

Online Booking System

Facility for tourists for booking online hotels and rent car should be provided in the Website

Developing Sustainable Tourism in NER

United Nations World Tourism Organisation defines **sustainable tourism** as**:**

"Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities"

The concept of sustainable development makes it possible to resolve the growing contradiction between the need to meet the growing needs of consumers (tourists), leading to the rapid development of the tourism industry, and a limited number of natural, social and economic resources of host destinations in the deteriorating ecological environment situation.

In accordance with the concept of sustainable tourism development, it is necessary not only to create conditions for the development of tourism, but also to consider thoroughly the consequences of this process. The complex challenge has to be dealt with: reduction of the negative effects of tourism and maximization of the positive effects. First of all it is essential to take care of the local people, their working conditions and the environment, that is important to consider the social and environmental impacts of tourism development. The trinity of economic, environmental and social goals in the policies pursued by the state is the key to the success of tourist activities.

While traditional investments in Tourism and Hospitality Sector dictate creation of large/ capital intensive infrastructure such as Start Hotels, Convention Centres, Amusement Parks, Recreation facilities etc., North Eastern Region, owing to its unique location and geography will need a bespoke approach to sustainable tourism. While creation of Start Hotel keys in State Capitals and Key Tourist Destinations is important, State Governments may look at promoting Homestays, Bed & Breakfast, Eco Tourism Villages etc. at other locations which are mostly used by hikers. Bikers, trekkers etc. Such projects will require minimal capital/ civil infrastructure and will rather require training and capacity building of local populace along with basic amenities and facilities. Such concepts which embed the local populace has multi-pronged advantages:

- Increased livelihood/ employment opportunities for local populace
- Training and Skill Development of Local residents – Certification on hospitality standards, hygiene, presentation, culinary skills etc.
- No/ Limited migration for labour/ livelihood
- Limited civil infrastructure development leading to preserving the intricate ecological and natural balance in the region
- Best-in-class experience for Tourists imbibing the cultural and social traditions of the region
- Tie-up with aggregators/ operators such as MakeMyTrip, ClearTrip, EasyTrip, OYO etc. will reduce marketing costs and bring in tourists to NER who stay for longer tenures (7-10 days0 and hence spend more in the region
- Multiplier effect on local economy

Public Private Partnership in Tourism

Public Private Partnerships (PPP) is a strategy to provide affordable infrastructure that meets the development requirements of an area. The term “public–private partnership” describes a

range of possible relationships among Public and private entities in the context of infrastructure and other services. In India's economic growth process, the Public-Private Mode of infrastructure financing has already started showing results. The North East Region (NER) so far is far behind in implementation of this mode. Therefore, the State Government needs to urgently explore the entry of the private sector for developing, financing, and managing the tourism infrastructure projects through the appropriate mode of Public-Private partnership. This will not only result in additional resources for the Sector but will also provide for better quality of infrastructure and more effective management. A well-developed legislation would enable private sector participation. The advantages of PPP projects include, but are not limited to, the following:

- The government receives the benefit of the private sector to mobilize finances and to use the best management skills in construction and O&M
- Private participation ensures efficiency and quality by using the best available technology and equipment
- Projects are conducted in a fully competitive bidding situation. Thus, they are completed, at least theoretically, if not actually, at the lowest possible cost.

The tourism industry in the NE region requires investment to build the infrastructure and grow to its potential. Because the tourism industry is a big beneficiary of tourist flows, it is important for private sector to be active partners in the development process for the tourism sector. The Government can act as the facilitator and partner for some projects, in addition to initial investments in opening up the sector. Some of the areas where private participation may be encouraged in NER are:

Road & Access Infrastructure

Infrastructure in terms of roads may not be a sector where one can look for PPP opportunities at this time, as there is a huge deficit and less traffic. Much of the infrastructure spending in NER would have to be done by the Central Government. PPP models such as Build-Operate-Transfer (BOT) being implemented in other states are unlikely to succeed particularly in road and rail networks.

Tourism Infrastructure

There are many projects which in NE Region can be implemented on PPP mode. Some of them are listed below:

- Hotels
- Convention Centres
- Restaurants
- Ropeways
- Destination Shopping
- Theme/Amusement Parks
- Adventure sports
- Sports Facilities
- Golf Courses- upgrade, modernise
- Nightlife
- Gaming
- Luxury Transport from other parts of country
- Helicopter services

Investment Opportunities in Tourism Sector in North Eastern Region

4. Investment opportunities in Tourism in NER

Arunachal Pradesh

Development of Ski Resort at Tawang

Name of Project	Development of Ski Resort at Tawang
Project Location	Tawang
Area of the project	8 to 10 Acres
Approx. Project cost	Subject to preparation of DPR
Focus sector	Eco-Tourism, Adventure Sports
Employment	Direct Employment 50 - 75
Status of approvals	Subject to DPR preparation
Project contours	• Tawang is one of the most picturesque part of the State with huge potential for adventure sports, film shooting and related activities. • Situated at a soaring height of around 10, 000 feet above the sea level, Tawang is one of the lesser known snowfall destinations in India. • The abundance of exotic Himalayan nature has made this region perfectly fit for a plethora of adventure activities which in turn is drawing a lot of attention of the tourists from its counterparts in the Northern Himalayas
Investment Opportunities	• Resort in Design, Build, Operate and Transfer (DBOT) mode
Connectivity	• Tezpur Airport in Assam ~143 Km is the nearest Airport, Helicopter services by Pawan Hans from Tawang to Guwahati is also available • Nearest Railway Station is Tezpur • Buses and Taxis ply regularly between Tezpur (Assam) and Tawang
Proposed Infrastructure	• Super Deluxe Rooms/ Deluxe Rooms/ Eco Huts • Restaurant • Games Room • Ski Shop • Glass House • Ropeway • Parking area
Nodal agency	Department of Tourism, Government of Arunachal Pradesh

Name of Project	Development of Hill Resort at Ziro
Project Location	Ziro
Area of the project	5 to 6 Acres
Approx. Project cost	INR 40 – 45 Cr.
Focus sector	Adventure Tourism
Employment	Direct Employment 50 - 75
Status of approvals	Subject to DPR preparation
Project contours	• The place has an imposing landscape of beautiful lush green forest, rivulets and elevated patches and is also famous for paddy-cum-pisciculture cultivation.
Investment Opportunities	• Resort in Design, Build, Operate and Transfer (DBOT) mode
Connectivity	• Jorhat Airport in Assam ~98 Km is the nearest Airport, Helicopter services by Pawan Hans from Ziro to Guwahati is also available • Nearest Railway Station is at Naharlagun ~ 100 kms • Buses and Taxis ply regularly between Guwahati and North Lakhimpur (Assam) and Ziro
Proposed Infrastructure	• Tourist Reception Centre • Restaurant • Cafe • Parking for visitors • Souvenirs store • 3 star Resort with 100 rooms
Nodal agency	Department of Tourism, Government of Arunachal Pradesh

Name of Project	Development of Motel cum Wayside Amenities at Bomdila
Project Location	Bomdila
Area of the project	5 to 6 Acres
Approx. Project cost	INR 40 – 45 Cr.
Focus sector	Tourism
Employment	Direct Employment 50 - 75
Status of approvals	Subject to DPR preparation
Project contours	• Located in the northwestern part of the state the place has brilliant landscape and snow-clad Himalayan mountain including the Kangto and Gorichen Peaks which are the highest peak of the state • Bomdila ranks amongst the leading tourist destinations in Arunachal Pradesh. Laden with apples, the huge trees in the orchards are great attractions to tourists • R.R. Hill is yet another important tourist attraction being Bomdila's highest point.
Investment Opportunities	• Design, Develop, Operate and Transfer Star Category Motel cum Wayside Amenity Centres
Connectivity	• Tezpur Airport in Assam ~150 Km is the nearest Airport • Nearest Railway Station is at Rangapara North Railway Station (Assam) ~ 143 kms • NH 15 and 13 enroute Tezpur is at a distance of 150 kms from Bomdila
Proposed Infrastructure	• Luxury Rooms • Food Court • Open Parking for Bus and Cars • Multi cuisine Restaurant • Kitchen and Storage • Garden Green Area • Minor Auto repair shop • Multi utility shops • Rest area for drivers
Nodal agency	Department of Tourism, Government of Arunachal Pradesh

Name of Project	Development of Eco Tourism Resort at Dibang Valley
Project Location	Dibang Valley
Area of the project	5 to 6 Acres
Approx. Project cost	INR 40 – 45 Cr.
Focus sector	Eco-Tourism, Adventure Sports
Employment	Direct Employment 50 - 75
Status of approvals	Subject to DPR preparation
Project contours	• Dibang Valley is one of the most picturesque part of the State with huge potential for adventure sports, film shooting and related activities • It's a beautiful place situated in between Tawang and Bomdila
Investment Opportunities	• Resort in Design, Build, Operate and Transfer (DBOT) mode
Connectivity	• Dibrugarh Airport in Assam ~160 Km is the nearest Airport • Buses and private taxis ply from Tinsukia and DIbrugarh (Assam) to DIbang Valley ~ 200 kms
Proposed Infrastructure	• Tourist Reception Centre • Restaurant • Cafe • Parking for visitors • Souvenirs store • 3 star Resort with 100 rooms
Nodal agency	Department of Tourism, Government of Arunachal Pradesh

Amusement Park/ Rural / Ethnic Retreat, Samaguri Beel

Name of Project	Amusement Park/ Rural / Ethnic Retreat, Samaguri Beel
Project Location	Samaguri, Nagaon
Area of the project	Beel Area spans 47 sq. km
Approx. Project cost	Subject to preparation of DPR
Focus sector	Tourism
Employment	Subject to preparation of DPR
Status of approvals	Area of land identified
Project contours	• The land is located about 16 kms to the east of Nagaon town • It is a migratory destination for migratory birds from all over the world • Various scenic spots are nearby the location • Silghat is around 50 kms from the area • Champawati Kunda a famous fall situated in Chapanala • Bordowa the birth place of Srimanta Sankardev
Investment Opportunities	• Paddle and House boat • Floating Restaurant • Cafeteria • Bird watchers and Watch towers • Parking for visitors • Luxury rooms with state of the art amenities • Cottages
Connectivity	• Nearest airport is LGB International Airport, Borjhar, Guwahati • Nearest railway station is at Nagaon and Haiborgaon
Nodal agency	Assam Tourism Development Corporation Ltd. (ATDC)

Adventure Tourism - Zip lines (Tezpur, Dima Hasao, Chandrapur, Chandubi)

Name of Project	Ziplines (Tezpur, Dima Hasao, Chandrapur, Chandubi)
Project Location	Tezpur, Dima Hasao, Chandrapur, Chandubi
Area of the project	Free hold
Approx. Project cost	Subject to preparation of DPR
Focus sector	Adventure Tourism
Employment	Subject to preparation of DPR
Status of approvals	Project identified - DPR being prepared
Project contours	• Various tourist spots are nearby in Tezpur, Dima Hasao, Chandrapur and Chandubi
Investment Opportunities	• Setting up of zip liners with adequate infrastructures in the selected areas
Connectivity	• Airports are available at Guwahati, Tezpur and Silchar • Railway stations are available at Guwahati, Tezpur, Digaru
Nodal agency	Assam Tourism Development Corporation Ltd. (ATDC)

Wellness Zone, Kaliabor

Name of Project	Wellness Zone at Kaliabor (15 Bighas near Bridge)
Project Location	Kaliabor, Nagaon
Area of the project	5 Acres
Approx. Project cost	Subject to preparation of DPR
Focus sector	Wellness Tourism
Employment	
Status of approvals	Land identified
Project contours	• Vacant land at kaliabor • Other nearby sites: - Bordowa – birthplace of Srimanta Sankardev (Assamese saint-scholar, poet, playright and social-religious reformer) - Akashiganga Waterfall - Laokhowa Wildlife Sanctuary - Chapanalla falls / Champawati Kunda
Investment Opportunities	Ideal property for development of • Wellness zone/ resort • Implementation format: PPP (Land on long term lease)
Connectivity	• Buses connect Nagaon with other parts of Assam • The nearest railway junction is at Chaparmukh, which is around 28 km from Nagaon • The nearest airport is Tezpur Airport. The nearest International Airport is LGB International Airport in Guwahati
Nodal agency	Assam Tourism Development Corporation Ltd. (ATDC)

Boutique Hotel at Tezpur

Name of Project	Boutique Hotel at Tezpur
Project Location	Tezpur, (near the bank of Brahmaputra)
Area of the project	1 Acre
Approx. Project cost	INR 20.00 - 25.00 Cr.
Focus sector	Tourism
Employment	25 – 30
Status of approvals	Land identified
Project contours	• Vacant prime land parcel at Tezpur (near the bank of Brahmaputra) • Nameri, the third National Park of Assam is located in the foothills of the Eastern Himalayas. Area is crisscrossed by the river Jia-Bhoroli and its tributaries namely the Diji, Dinai, Doigurung, Nameri, Dikorai and Khari.
Investment Opportunities	• 4 Star Boutique Hotel with 50 rooms in Design, Build, Operate and Transfer (DBOT) mode
Connectivity	• Tezpur airport is ~37 km from the site. Tourist buses and taxis are available from the airport • Nearest railway station is Rangapara which is 25 km from the site and connects to Guwahati. • It is near the Bomdila Highway which connects Guwahati, Nameri and Tawang (Arunachal Pradesh). Well connected by buses from Guwahati, Tezpur and Nagaon.
Nodal agency	Assam Tourism Development Corporation Ltd. (ATDC)

Mini Film City, Haflong, Dima Hasao

Name of Project	Development of Film City at Haflong, Dima Hasao, Assam
Project Location	Haflong, Dima Hasao
Area of the project	50 Acres
Approx. Project cost	INR 500.00 – 600.00 Cr.
Focus sector	Film Tourism
Employment	More than 300
Status of approvals	Land identified
Project contours	• Vast scenic area covering 50 Acres • The area has varied natural topography with hills, valleys, ravines, flat open spaces, natural woods and water bodies
Investment Opportunities	• 30 outdoor shooting locations to be developed • Outdoor locations to be developed such as – Shopping complex, Mosque, temple, church, helipad, playground, jail, buildings, gardens, lake, bridges, court room, hotels, club house etc. • Studios to be developed in 80,000 to 1,25,0000 sq. ft area • Make up rooms to be developed • Design Build Operate & Transfer
Connectivity	• Nearest airport is Silchar airport • Nearest railway station is Haflong
Nodal agency	Assam Tourism Development Corporation Ltd. (ATDC)

Manipur

Five Star Hotel at Imphal

Name of Project	Five Star Hotel at Imphal
Project Location	Imphal
Area of the project	6 to 7 Acres
Approx. Project cost	INR 250.00 - 280 Cr.
Focus sector	Tourism
Employment	100 – 125
Status of approvals	Project subject to DPR
Project contours	• Imphal can be deemed as one of the leading tourist destinations in India because it offers everything from culture to nature, and from wildlife to adventure to all its visitors. Some of the tourists places are - Ema Keithel (Mother's Market) - Loktak Lake - Red Hill Lokpaching - Kangla Fort - Sirohi National Park - Keibul Lamjao National Park • 24 hours Reception, multilingual staff • Doorman-service or valet parking • Concierge, page boy • Spacious reception hall with several seats and beverage service • Personalized greeting for each guest with fresh flowers or a present in the room • Minibar and food and beverage offer via room service during 24 hours • Internet-PC in the room • Safe in the room • Ironing service (return within 1 hour), shoe polish service • Turndown service in the evening • Mystery guesting • 2 A-la-carte restaurants • Bar • Private chef and butler service • Guest relations assistant • Activities like swimming pool, Shops, Indoor & Outdoor games, recreation centre, Spa, Saloon, beauty parlor, etc
Investment Opportunities	• 5 Star Hotel with 200 rooms in Design, Build, Operate and Transfer (DBOT) mode
Connectivity	• Nearest Airport is Imphal Tulihal Airport 8 kms from the City • Nearest Railway station is Dimapur town of Nagaland • Buses and Taxis ply from major neighboring towns like Agartala, Dimapur, Shillong, Itanagar etc.
Nodal agency	Directorate of Tourism, Government of Manipur

Destination Development – Eco Tourism Resort at Senapati

Name of Project	Development of Eco Tourism Resort at Senapati
Project Location	Senapati
Area of the project	5 to 6 Acres
Approx. Project cost	INR 35 - 45 Cr
Focus sector	Eco-Tourism, Adventure Sports
Employment	50 - 75
Status of approvals	Project subject to DPR
Project contours	• Scenic landscape adorned with shimmering serpentine streams and rugged mountains
Investment Opportunities	Resort in Design, Build, Operate and Transfer (DBOT) mode
Connectivity	• Nearest Airport is Imphal Tulihal Airport • Nearest Railway station is Dimapur town of Nagaland • Buses and Taxis ply from major neighboring towns like Agartala, Dimapur, Shillong, Itanagar etc.
Proposed Infrastructure	• Tourist Reception Centre • Restaurant • Cafe • Parking for visitors • Souvenirs store • 3 star Resort with 100 rooms
Nodal agency	Directorate of Tourism, Government of Manipur

Meghalaya

Eco Tourism Resort at Sohra

Name of Project	Development of Eco Tourism Resort at Sohra
Project Location	Sohra
Area of the project	5 to 6 Acres
Approx. Project cost	INR 35 - 45 Cr
Focus sector	Eco-Tourism, Adventure Sports
Employment	50 - 75
Status of approvals	Project subject to DPR
Project contours	• Sohra, previously known as Cherrapunjee, a Sub-Division in the East Khasi Hills District of Meghalaya, is set upon a plateau on the southern slopes of the state. • Sohra is dotted with waterfalls cascading over deep gorges and the swift flowing rivers and streams flow in a southernly direction to the plains.
Investment Opportunities	Resort in Design, Build, Operate and Transfer (DBOT) mode
Connectivity	• The nearest airport to the hill station is the Umroi Airport near Barapani, and Guwahati Airport • Nearest Railway station is Guwahati about 181 kilometres away • Buses and Taxis ply frequently from Guwahati and Shillong
Proposed Infrastructure	• Tourist Reception Centre • Restaurant • Cafe • Parking for visitors • Souvenirs store • 3 star Resort with 100 rooms
Nodal agency	Department of Tourism, Government of Meghalaya

Name of Project	Development of Wellness Resort, Shillong
Project Location	Shillong
Area of the project	5 to 6 Acres
Approx. Project cost	INR 35 – 45 Cr.
Focus sector	Wellness Tourism
Employment	
Status of approvals	Subject to preparation of DPR
Project contours	• The name Shillong is derived from U-Shyllong, a powerful deity and is situated at an altitude of 1,491m above sea level. Some of the attractive tourists places near Shillong are - Smit - Mawphlang - Mawsynram - Mawlynnong Village (cleanest village in India)
Investment Opportunities	Ideal place for development of • Wellness zone/ resort • Implementation format: PPP (Land on long term lease) • Deluxe, Premium and Family Suites • Multipurpose Hall • Yoga and Meditation Hall • Treatment Centre • Gym / Spa / Steam / Sauna/ Jacuzzi • Pool with Natural Surrounding • Restaurants • Fitness and Gaming Zone
Connectivity	• The nearest airport to the hill station is the Umroi Airport near Barapani, which is about 25 kilometres away and Guwahati Airport, which is about 125 kilometres away • Nearest Railway station is Guwahati about 100 kilometres away • Buses and Taxis ply frequently from Guwahati
Nodal agency	Department of Tourism, Government of Meghalaya

Mizoram

Development of Hill Resort at Saiha

Name of Project	Development of Hill Resort at Saiha
Project Location	Saiha
Area of the project	5 to 6 Acres
Approx. Project cost	INR 35 – 45 Cr.
Focus sector	Tourism
Employment	50 - 75
Status of approvals	Subject to DPR
Project contours	• Saiha is one of the fastest growing town in Mizoram with rapidly growing population and located at an average height of 729 meters above sea level • The place is considered as the paradise for angling enthusiasts • Tourist attraction places in Saiha are Pala Tipo Lake, Saikao and Mount Mawma, Palak Wildlife Sanctuary
Investment Opportunities	Resort / Hotel in Design, Build, Operate and Transfer (DBOT) mode
Connectivity	• Nearest airport is Aizawl Airport 147 km away (Lengpui Airport) • Nearest railway station is Silchar Railway Station, which is 258 km away • Connected to other major cities of the country
Proposed Infrastructure	• Tourist Reception Centre • Restaurant • Parking for visitors • Souvenirs store • 3 star Resort / Hotel with 100 rooms
Nodal agency	Department of Tourism, Government of Mizoram

Name of Project	Development of Wellness Resort, Aizwal
Project Location	Aizwal
Area of the project	5 to 6 Acres
Approx. Project cost	INR 35 – 45 Cr.
Focus sector	Wellness Tourism
Employment	
Status of approvals	Subject to preparation of DPR
Project contours	• Among one of the oldest cities in the north eastern region of India, with an elevated setting and breath taking views, Aizawl is a peaceful town and the capital of the state • Home to the Mizoram State Museum and few other tourist complexes, tourists can enjoy a sightseeing tour in the city and to nearby places like. Apart from these, one can take a tour to the nearby hilly areas of Hmuifang, Tamdil Lake and Chanmari.
Investment Opportunities	Ideal place for development of • Wellness zone/ resort • Implementation format: PPP (Land on long term lease) • Deluxe, Premium and Family Suites • Multipurpose Hall • Yoga and Meditation Hall • Treatment Centre • Gym / Spa / Steam / Sauna/ Jacuzzi • Pool with Natural Surrounding • Restaurants • Fitness and Gaming Zone
Connectivity	• Nearest airport is Aizawl Airport (Lengpui Airport) • Nearest railway station is Manu, which is 71 km away • Connected to other major cities of the country
Nodal agency	Department of Tourism, Government of Mizoram

Nagaland

Destination Development – Eco Tourism Resort at Kohima

Name of Project	Development of Eco-Tourism Resort at Kohima
Project Location	Kohima
Area of the project	5 to 6 Acres
Approx. Project cost	INR 35 - 45 Cr
Focus sector	Eco-Tourism, Adventure Sports
Employment	50 - 75
Status of approvals	Project subject to DPR
Project contours	• Situated in the foothills of Japfu range located south of Kohima District, Kohima is the capital of Nagaland with range of tourists circuits nearby Some of the attractive tourists places near Kohima are - Dzükou Valley - Khonoma Green Village - Tuophema Tourist Village - Japfü Peak - Dzüleke
Investment Opportunities	Resort in Design, Build, Operate and Transfer (DBOT) mode
Connectivity	• The nearest airport is Dimapur Airport is approximately 70 kilometers from Kohima • Nearest railway station is in Dimapur, approximately 70 kilometers from Kohima • Kohima is well connected by roadways with the major neighboring cities like Guwahati, Imphal, Shillong
Proposed Infrastructure	• Tourist Reception Centre • Restaurant • Cafe • Parking for visitors • Souvenirs store • Multi utility Shop • 3 star Resort with 100 rooms
Nodal agency	Department of Tourism, Government of Nagaland

Name of Project	Development of Craft Village / Theme Park / Amusement Park / Luxury Resort at Dimapur
Project Location	Dimapur
Area of the project	5 to 6 Acres
Approx. Project cost	Subject to preparation of DPR
Focus sector	Tourism
Employment	50 - 75
Status of approvals	Subject to preparation of DPR
Project contours	• Dimapur enjoys a special status because of its unique location. It is the only town of the state, situated on the plain area having excellent road, rail and air links with various part of the country. • Apart from archeologist tracing its intriguing past, the place remains thronged with business travelers due to its commercial centers. There are many starlit attractions in the Dimapur like Zoological Park, Ao Baptist Church, Diezephe Craft Village, Nagaland Science Centre, Green Park.
Investment Opportunities	Ideal location for development of • Craft Village • Theme Park • Amusement Park and • Luxury resort Implementation format: PPP (Land on long term lease)
Connectivity	• The nearest airport is Dimapur Airport • Nearest railway station is in Dimapur • Dimapur is well connected by roadways with the major neighboring cities like Guwahati, Imphal, Shillong
Nodal agency	Department of Tourism, Government of Nagaland

Sikkim

Development of State of the Art Convention and Wellness Centre at Gangtok

Name of Project	Development of State of the Art Convention and Wellness Centre at Gangtok
Project Location	Gangtok
Area of the project	25 to 30 Acres
Approx. Project cost	INR 250 – 300 Cr. (Subject to DPR)
Focus sector	Wellness Tourism
Employment	150 to 200
Status of approvals	Subject to DPR
Project contours	• Gangtok, the capital city of Sikkim is located on a ridge at a height of 5500 feet and with a spectacular view of the Khangchendzonga, the town provides the perfect base for travel through the state • Hanuman Tok, a temple dedicated to Lord Hanuman, is situated at an altitude of 7200 feet at a distance of about nine kilometres uphill from Gangtok on a blissfully calm and quiet hilltop
Investment Opportunities	Design, Build, Operate and Transfer (DBOT) mode
Connectivity	• Nearest airport is Pakyong Airport which is 30 km from away • Nearest railway station is Siliguri • Well Connected with major cities
Proposed Infrastructure	• Convention Hall • Meeting Halls • Auditorium • Reception, Foyer and Circulation • Open and Landscaped Area • Administration Area • Yoga, Ayurveda and Naturopathy Centre • Physiotherapy, Wellness/ Treatment Centre • Operation Theatre • Organic Food Facility • Nursery of Medicinal and Aromatic Plant
Nodal agency	Department of Tourism, Government of Sikkim

Name of Project	Development of Wellness Zone, Ralong, Sikkim
Project Location	Ralong
Area of the project	10 to 15 Acres
Approx. Project cost	Subject to DPR
Focus sector	Wellness Tourism
Status of approvals	Subject to preparation of DPR
Project contours	• Sikkim has many hot springs known for their therapeutic value with high in Sulphur content, the waters are believed to have great medicinal properties with the average temperature of the water in these hot springs close to 50c. • Borong and Ralong Hot Springs are located within a distance of 7 km from each other which are popular with visitors from all over the region, these natural spas are said to have curative powers
Investment Opportunities	Ideal place for development of • Wellness zone with natural hot springs • Implementation format: PPP (Land on long term lease) • Deluxe, Premium and Family Suites • Multipurpose Hall • Yoga and Meditation Hall • Treatment Centre • Gym / Spa / Steam / Sauna/ Jacuzzi • Pool with Natural Surrounding • Restaurants • Fitness and Gaming Zone
Connectivity	• Nearest airport is Pakyong Airport which is 82 km from away • Nearest railway station is Siliguri • Connected through Gangtok which is 76 km away
Nodal agency	Department of Tourism, Government of Sikkim

Tripura

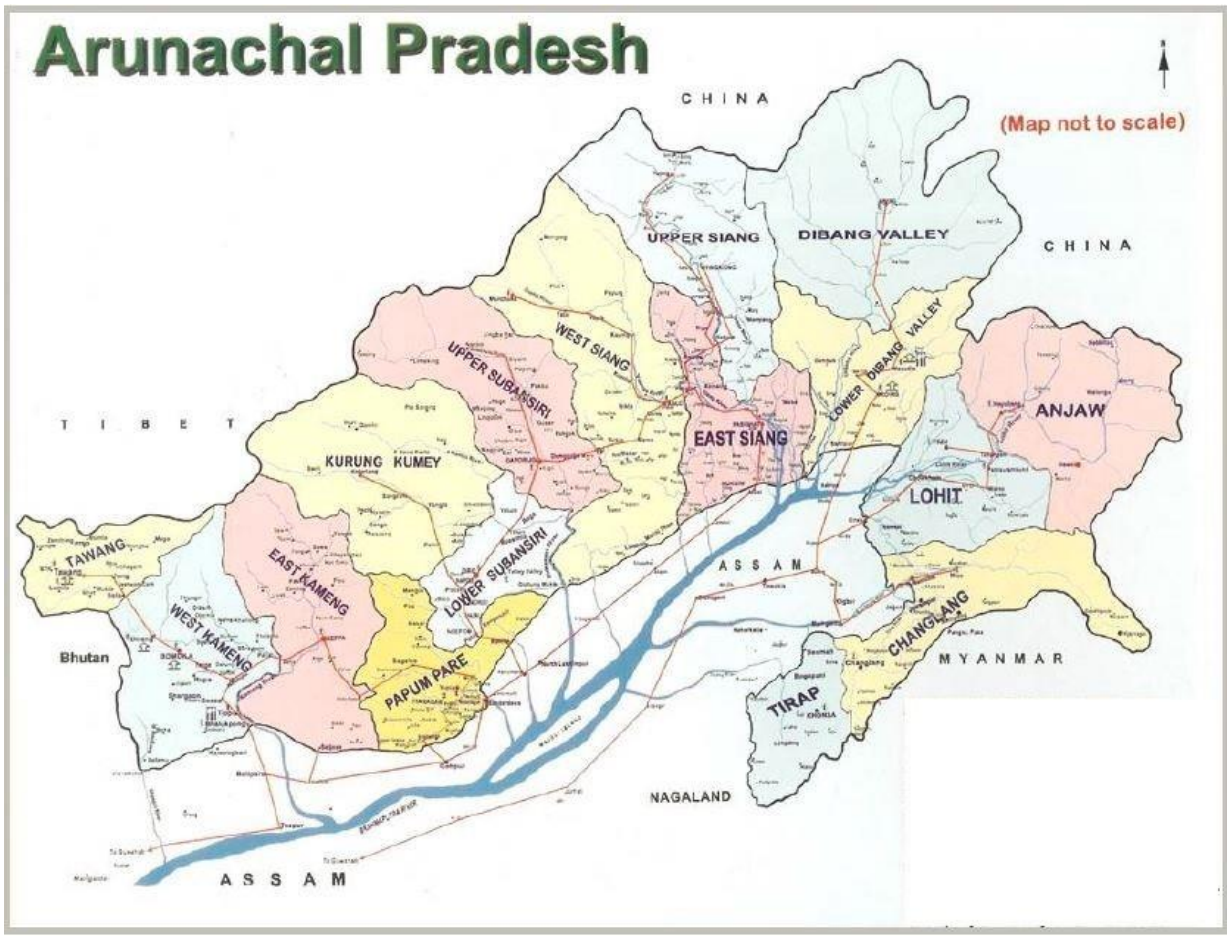
Development of Luxury Heritage Resort at Agartala

Name of Project	Development of Luxury Heritage Resort at Agartala
Project Location	Agartala
Area of the project	5 to 6 Acres
Approx. Project cost	Subject to preparation of DPR
Focus sector	Heritage Tourism
Status of approvals	Subject to DPR
Project contours	• Agartala is famous for its temples, palaces, and rich history of the Manikya kings and its connection to Nobel Laureate Rabindranath Tagore • Ideal Heritage sites nearby are - Ujjayanta Palace - Neermahal Water Palace - Bhubaneswari Temple - Jagannath Temple - Durgabari Tea Garden - Heritage Park - Checkpost along Agartala - Akhaura, India - Bangladesh border
Investment Opportunities	• Luxury Heritage Resort Implementation format: PPP (Land on long term lease)
Connectivity	• Nearest Airport is Singerbhil Airport in Agartala • Nearest Railway Station is in Agartala • Well connected to major cities through road
Nodal agency	Department of Tourism, Government of Tripura

Name of Project	Development of Rural and Ethnic Retreat Resort, Jampui Hills
Project Location	Vanghmun, North Tripura
Area of the project	5 to 6 Acres
Approx. Project cost	Subject to preparation of DPR
Focus sector	Nature and Adventure Tourism
Status of approvals	Subject to DPR
Project contours	• Jampui Hills is situated about 200 Km. away from Agartala and is the highest hill range in the state • During November every year, the unique Orange & Tourism festival is celebrated in the Jampui hill. A large number of tourists, both domestic and foreign, participate and enjoy this festival • Good trekking routes in the hill range for tourists
Investment Opportunities	• Multi Cuisine Restaurant • Cafeteria • Bird watchers and Watch towers • Parking for visitors • Luxury rooms with state of the art amenities • Cottages
Connectivity	• Nearest Airport is Singerbhil Airport in Agartala • Nearest Railway Station is in Agartala • Connected to Agartala through road
Nodal agency	Department of Tourism, Government of Tripura

Overview of Tourism Sector in Arunachal Pradesh

5. Tourism Sector in Arunachal Pradesh – An Overview



Arunachal Pradesh has **12 tourist circuits** across 83,500 sq. Km**.** each tourist circuit is distinctive in character with different ethnic culture, topography and vegetation.

1. Tezpur-Bhalukpong-Bomdila-Tawang
2. Itanagar-Ziro-Daporijo-Aalo-Pasighat
3. Pasighat-Jengging-Yingkiong-Tuting
4. Tinsukia-Tezu –Hayuliang
5. Margherita-Miao-Namdhapa-Vijoynagar
6. Roing-Mayudia-Anini
7. Tezpur-Seijosa-Bhalukpong
8. Ziro-Palin-Nyapin-Sangram-Koloriang
9. Doimukh-Sagalee-Pake Kessang-Seppa
10. Aalo-Mechuka
11. Daporijo-Taliha-Siyum-Nacho
12. Jairampur - Manmao- Nampong – Pangsau Pass

Additionally, the following circuits have also been identified as new tourist circuits in the state. The new circuits are as follows:

- Doimikh-Sagalee-Kesang-Seppa
- Zero-Palin-Nyapin-Sangram-Koloriang

- Along-Mechuka
- Daporijo-Taliha-Siyum-Nacho
- Pasighat-Jengging-Yingkiong-Tuting

For integrated development of tourism in the entire N.E region, DoNER and North east Council have identified six tourist circuits in Vision 2020 document for development in N.E region, Out of six circuits, three circuits are connected to Arunachal Pradesh.

- Guwahati-Tezpur-Bhalukpong-Bomdilla-Tawang-Tezpur-Guwahati
- Guwahati-Manas-Pasighat-Miao-Mokokchung-Kohima-Kaziranga-Guwahati
- Guwahati-Namdafa-Dibrugarh-Mon-Mokokchung-Touphema-Kohima-Guwahati

Classification of Tourist Destination in Arunachal Pradesh

A. Religious Tourism

Arunachal Pradesh is one of the fast emerging tourist destinations especially amongst Buddhist and Hindu religious travellers. Arunachal Pradesh It is richly endowed with ancient temples and monasteries. The tourist spots with religious importance include the Parashuram Kund, believed to be the place where the mythological Parashuram had washed his sins, and the 400 year old Tawang monastery.

	Sites	Location	Key Highlights
	Tawang Monastery	Tawang City of Tawang Distrit	Tawang monastery is the largest Monastery in India and second largest in the World. Internationally acclaimed and in the travel wish list of many. It was founded in the 17th Century in accordance to the wishes of the 5th Dalai Lama, Nagwang Lobsang Gyatso
	Urgelling Monastery	Tawang District	The monastery was built in 1487 AD. It is the Birth Place of 6th Dalai Lama, Tsangyang Gyatso
	Samtem Yongcha	Mechukha in West Siang District	This monastery is around 400 years old and is in Mechuka. This monastery is also very significant one and set in beautiful landscape
	Bomdila Monastery	Bomdilla in West Kameng District	Also known as Gentse Gaden Rabgyel Lling Monastery is a famous pilgrimage of the Lamaistic faith which belongs to Mahayana Buddhism. It was built in 1965 by the twelfth incarnation of the TsonaGontse Rinpoche
	Rigyalling Monastery	Tawang District	Located amidst the panoramic lush green trees and serene atmosphere in the Tawang district, the Rigyalling monastery is a major centre of Buddhist learning in Arunachal Pradesh

	Tokstang Monastery	Tawang District	Also known as the 'tiger's den', the Taktsang monastery lies 45 kilometers away from Tawang. The monastery is surrounded by a dense coniferous forest and snowy mountains, thereby presenting a calm picture of the place making it a perfect centre of meditation. The Taktsang monastery is also said to be visited by Guru Padmasambhava in the 8th century
	Brama Dung Chung Ani Gompa	Tawang District	The oldest Ani Gompa (Nunnery) in Tawang district of Arunachal Pradesh, this nunnery is located in the lap of a far off mountain surrounded by natural beauties
	Gyangong Ani Gompa	Tawang District	This beautiful Nunnery, having about 50 Buddhist Nuns is located on top of a beautiful hillock about 5 km away in the north of Tawang
	Singsur Ani Gompa	Tawang District	This Gompa is one beautiful nunneries of Tawang district. It is located at a distance of about 28 km west from the Tawang district
	Gorsam Chorten	Tawang District	Constructed in the 12th Century, Gorsam Chorten is the largest stupa in the area with a height of over 100 feet.
	Parasuram Kund	Lohit District	Famous Hindu Pilgrim. A lakh of pilgrims visit this place from all parts of India every year during Parasuram Mela held in the month of January.
	Bhismaknagar	Roing, Lower Dibang Valley district	A sacred heritage site of the Idu Mishmis who belong to one of the primitive tribal communities of Arunachal Pradesh
	Malinithan	Likabali, Lower Siang district	This place is associated with the legend of Lord Krishna marrying Rukmani

B. Hill Station

	Tawang	Tawang situated at an elevation of 3048 mt. in north western part of Arunachal Pradesh, it is home to the Tawang Monastery which is the second largest and oldest in Asia. The monastery is three stories high and is enclosed by a 282 mt. long compound wall. Tawang offers panoramic views of huge mountains, beautiful valleys, waterfalls and lakes. There are many other places of interest like Sela Pass, Jang Waterfalls, PTSO Lake etc.
	Mechuka	Also known as Menchukha, is a small picturesque town nestled at 1829 mt. in West Siang District. Menchukha is situated in a forested valley, surrounded by pine trees and thorn bushes with the river Yargyapchu flowing through the valley.

		It is home of the Tibetan-Buddhist Memba people- is a quaint town with a picturesque valley near the Indo-Tibet border. One can get a great view of snow covered mountain peaks and snow fall during the winter. Mechuka Lake is a high altitude natural lake with pristine natural beauty. Samtem Yongcha is situated here.
	Ziro	A picturesque town in Lower Subansiri district, it is home to the Apatani tribe. Located an altitude of 5754 feet above the sea level, the place is famous for gentle pine clad hills and rice fields. It also hosts the popular Ziro Music Festival in September every year. Ziro is also included as in India's Tentative List for UNESCO's World Heritage Site
	Pasighat	It is the oldest town of Arunachal Pradesh founded in 1911 A.D. by the British. The Brahmaputra emerges from the foothills of Pasighat under the name of Dihang or Siang
	Along	At an altitude of 300 meters from the sea level, it is an enchanting tourist destination surrounded by mountains on all sides

C. Historical

	Ita Fort	Historical fort of an irregular shape, built mainly with bricks, dating back to the 14th -15th centuries
	Talung Dzong	It was the site where a monastic rule was formed during the period of the 12th century A.D.
	Dzong Building	It is associated with Guru Padma Sambhawa's tradition. This Dzong was also empowered with the right to collect the Annual Tax from the areas of Tukpan and also certain places in Assam.
	Bhalukpong	Bhalukpong has several forts that belong to the times between the 10th and the 12th centuries
	Jameri Megalithic	A megalithic island situated away from the Khasi-Jaintia Cachar-Naga belt. It has great value to the locals
	Dirang Fort	Locally known as 'JONG', the fort at Dirang is an important historical monument for the Monpas of Dirang circle
	Gyuto Tantric University	80 km from Bomdila on the Bomdila-Kalaktang route, the Gyuto Tantric University conducts training to monks to acquaint them with tantrism. Additionally, grammar, poetry of Tibetan script, modern English, Hindi, Mathematics, and General Science etc are also taught
	Lhagyala Gonpa Morshing	Situated in the mountainside, the Gonpa is the repository of immense treasure and antiquities of Buddhist Sectarians and plays an important role in the socio-political and religious life of the people of the entire area

	Bismaknagar	Located at the foothills of the Mishmi hills, it has the ruined fort of Mahabharata. The ruins of Bishmak Nagar are a sacred heritage site for Idu Mishmi tribe. It is also believed to be the home of Rukmini, Lord Krishna's consort.
	Tawang Gompa	Perched at 2760 m high ridge with commanding view of the splendid valley beyond, this 400 year old Gompa is one of the most renowned in India.
	Statue of Sakyamuni	The statue of Sakyamuni, the historical Buddha is amazing and the numerous sculptures and the valuable manuscripts in the library are great collections revealing the glorious and ancient past.
	Malinithan	Excavations here have revealed relics of magnificent temples with splendid sculptures and valuable scriptures dating back to 14th – 15Th Century. The most important sculptures here are sculptures of Lord Indra on his elephant Airavat, Surya on Chariot and huge Nandi Bull.

D. Nature based/ Eco Tourism

About 82% of total geographical area of 83,743 sq. kms. In Arunachal Pradesh is forest area[3]. Within forest area, about 62% of the total geographical area comprising of 10185.40 sq. km. of Reserve & Protected Forests which is about 12% of the area, while the Protected Area Network covers an area of 9527.99 sq. km being 12% of the area and balance 38% is unclassified Forest.

The important forests types found in the state are Tropical evergreen, semi evergreen, deciduous, Pine, Temperate, Alpine and grassland etc. Forests are the mainstay for the people of Arunachal Pradesh and are the richest bio-geographical province in eastern Himalayan zone. The State has 20% species of country's fauna, 4500 species of flowering plants, 400 species of pteridophytes, 23 species of conifers, 35 species of bamboos, 20 species of canes, 52 Rhododendron species & more than 500 species of orchids and is considered as one of the 12 mega diversity "Hot Spots" in the world. Forests generate the largest employment and it is the single largest source of revenue for the State. Arunachal Pradesh has been recognized as one of the 18 biodiversity hotspots of the world.

The Forest Eco-System of Arunachal Pradesh is linked to the forests of neighbouring countries like Bhutan, Tibet and Myanmar. Ten districts of Arunachal Pradesh have altitudinal variation forming bio-diversity zone of Tropical, Sub-Tropical, Temperate, Sub-Alpine and Dry-Alpine. Having several rich flora and over 500 species of fauna Arunachal is the ultimate place to visit for wildlife tourism.

[3] Source: http://arunachalforests.gov.in

There are nine Wildlife Sanctuaries, one Biosphere Reserve (Dibang Biosphere Reserve) and two National Parks in Arunachal Pradesh covering about 14,639.48 sq km (area of protected areas except biosphere reserve is 9,488.48 sq km).

There are two tiger reserves namely Namdapha Tiger Reserve and Pakke Tiger Reserve. In addition, one Elephant Reserve has been notified as Kameng Elephant Reserve, covering the district of Papum-pare, East Kameng and West Kameng. The notable wildlife sanctuaries and national parks are Pakhui Wildlife Sanctuary, Kane Wildlife Sanctuary, Eaglenest Wildlife Sanctuary, Mouling National Park, Mehao Wildlife Sanctuary, Dr, D. Ering Memorial Wildlife Sanctuary, Dihang-Debang Biosphere Reserve and Namdapha Wildlife Sanctuary.

The lush green meadows and archers of woodlands provide a perfect shelter to some of the rare animals and birds. Arunachal Pradesh is perhaps the only state to have four major cats - tiger, leopard, clouded leopard and snow leopard. Besides, other cats like the golden cat, leopard cat and the marbled cat are also found around Arunachal. Apart from the giant cats, this wildlife destination has other major attractive species like hoolock gibbon, Assamese macaque, pig-tailed macaque, capped langur. One of the endangered species 'hispid hare' is also found in the state.

Way forward

Following parameters are crucial for growth of Tourism industry in any State/ Country:

a. **Connectivity –** Rail, Road, Air etc.
b. **Infrastructure** – Connectivity & Hospitality
c. **Convenience** in getting travel permits/ clearance
d. **Marketing & Promotion** – Information dissemination

Above parameters apply aptly to the tourism Industry of the Arunachal Pradesh. The state has:

- Poor connectivity infrastructure
- Under developed tourism and hospitality infrastructure
- Entry permits and area based movement restrictions
- Inadequate marketing and promotion of tourist destinations

Poor connectivity infrastructure is a major deterrent for tourists travelling on tight schedules. Ziro, Tawang Valley and Bomdila despite being popular tourist destination, connectivity is a major issue. Currently the travel time from Tezpur to Tawang takes over 10 hours which is tiring. Further, the road connectivity is affected during rainy and winter season due to landslides and poor visibility. Same is the case with helicopter service. The service gets affected during monsoon and peak winters. Besides this, the helicopter schedule is inconsistent.

A major road connectivity project for Twang is the immediate need for development of tourism in Tawang district for promoting Buddhist tourism and travellers seeking adventure. An all-weather express road connectivity between Tawang and major cities would not just boost tourism but, shall also help the farmers realize the true commercial value of fruits viz kiwi, apple, oranges and other horticulture produce cultivated in this region.

The state has a huge scarcity of high end star category hotels in the State. Attempts must be made for attracting industry giants, to set-up hospitality units in the State. Presence of high end hotels in the State shall help in increasing the footfall of high end domestic and foreign tourists. Also, this will help in attracting reputed film production units, to take up film shooting projects in the State. This in turn will create employment opportunity for allied support service in the State. Arunachal is blessed with natural scenic beauty and presence of good quality star hotels will increase film tourism in the State.

In order to protect the indigenous identity of the tribal populace and to regulate the movement of to certain areas located near the international border areas of Arunachal Pradesh, it is obligatory for Indian citizens from outside states and foreign nationals to obtain a permit known as inner line permit or ILP for entering Arunachal Pradesh through various gates along the Assam-Arunachal Pradesh border. The permit is necessary under the provisions of the Bengal Eastern Frontier Regulation, 1873. These permits are valid for 15 days and needs to be renewed thereafter.

Though, there is an online system in place for application and issue of ILP, provision for issue of ILP on arrival may be introduced at the entry gates and various helipads and airports. Also, the movement restriction across various border and protected area may be relaxed in consultation with Ministry of Home Affairs and other stake holder departments. This will ease the movement of tourists willing to visit Arunachal Pradesh.

Another important factor responsible for poor visibility of the State is, insufficient attention on tourism marketing and promotion activity. This is a week area and needs immediate attention for improving the visibility of the State's tourism potential. For year 2016-17, against a total tourism budget of INR 88.70 Crore, only INR 4.8 Crore was allocated for marketing and promotion activity. This is very insignificant when compared to the budget of States like Kerala who spend over INR 82 Crore, annually on marketing and promotion activities.

Going forward the State needs to increase its spending on tourism marketing and promotion activities. Also, a focussed approach needs to be adopted for promotion of tourist destination in the State. Multi-pronged strategy involving judicious media mix may be adopted for marketing & promotion of Tourism in the State. Additionally the following may also be considered in the list of promotion activity for:

a. **Religious Tourism & Historical Sites**: Popular Buddhist pilgrimage and other Religious sites may be promoted by organising various religious conclave and annual fairs
b. **Cultural, Heritage tourism, Eco-tourism, Adventure tourism**: The State may participate and/ or organize tourism related summits conducted by SAARC, BIMSTC. This will improve the visibility of the State in international diaspora
c. **Adventure, Destination based Tourism**: The State already organises various dance and cultural festivals viz. Mechuka Adventure Festival, Arunachal Carnival, Pangsau Pass Festival, Ziro Music Festival etc. However adequate promotion of these events is not there. Active promotion campaign may be undertaken over TV, Electronic and Digital media for promotion of the event. Additionally the State may also consider conducting popular rock music concerts like Weekender in the State. Popular music concerts will help in attracting music enthusiast from various parts of the country and globe. The government may consider organising these events in new locations every year for promoting new locations.

d. **Promotion of Tribal Games**: Indigenous games of Arunachal Pradesh have been closely attached with celebration and festivities and form a vibrant expression of the cultural identity of the communities. Theme based promotion of some of the games should be made either back- to- back with the local festivals or as standalone events. The identified games are (i) Mimic Warfare (ii) Mock Hunting (iii) Archery (iv) Snake Games (v) Dragon Trail (vi) Hog's Rub (vii) Cat and Mouse, etc. Some of the Children's Games should also be highlighted.

In addition to above Government may consider organising the following:

a. **Exhibition & Workshops** for wild life photography for promotion of various wild reserves and sanctuary
b. **Subsidising reputed Business Conclaves** organised in Arunachal Pradesh will increase popularity of Arunachal Pradesh will draw attention of reputed corporates and investors. This has the potential of attracting fresh investment in the State across various sectors
c. **Organising film festival** during various music festivals and Adventure camps. This will increase the visibility of the state's potential in film tourism
d. Further the state must regularly **participate in various national & international tourism events/ conclave.** This will increase the visibility of the State in international diaspora
e. Setting up of **Tourist information centre/ kiosk** in all the major airports. Handy collaterals and flyer on Arunachal Pradesh tourism may be made available in these tourist information centres
f. Round the year **Airport branding and promotion** of Arunachal Tourism may be done in popular tourist airports viz. New Delhi, Kolkata, Mumbai, Bangalore, Guwahati etc.
g. Regular **in-flight magazine campaign** may be considered for promotion of Arunachal Pradesh tourism as majority of leisure travellers use Air as preferred means of travel
h. Regular **B2G interaction** with Tourism and Hospitality industry leaders to attract fresh investment and to understand industry needs will help shape the policy and investment ecosystem in the State

A focussed marketing strategy complemented by private participation in development of connectivity and tourist infrastructure shall result in creating a sustainable tourism industry in the State.

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