

Roundtable on Investment Opportunities in Meghalaya

Tourism and Hospitality Sector



Shillong

14th December 2023

Meghalaya, among the eight states of North-East India

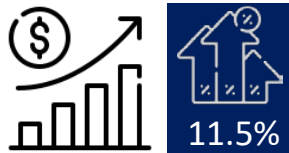
Meghalaya, the abode of clouds, is known to be one of the richest biodiversity areas in the world.



Geographical area of **22,429 sq. km**



Forest cover of about **76%**



GSDP stands at approximately **Rs. 46,000 Cr**



Per Capita Income of **Rs. 1,10,002**

VISION

To be amongst the top ten States (by 2032) in per capita income and achievement of Sustainable Development Goals

OBJECTIVES

- Increase GSDP by 50%
- 2x farmers' income
- Healthy women & children
- Quality education for all
- 5 Lakh Employment
- Increase Border Trade
- New Shillong City
- Most preferred tourist destination
- Basic Amenities for all
- Nurturing future Olympians

FOCUS SECTORS



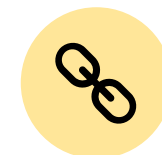
Industrial



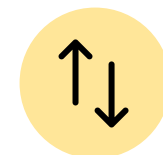
Agri & Allied



Tourism



Infra & Urban



Governance



Sports



Energy



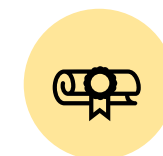
Mining



Climate



Healthcare



Education



Entrepreneurship

Meghalaya, an offbeat and nature-centric tourist destination



Tourism sector provides livelihood opportunities to almost 50,000



We expect to hit pre-covid levels in the year 2023



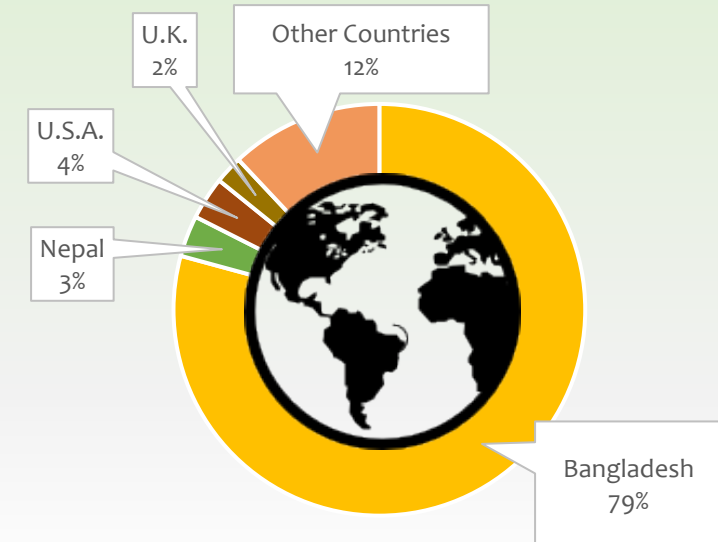
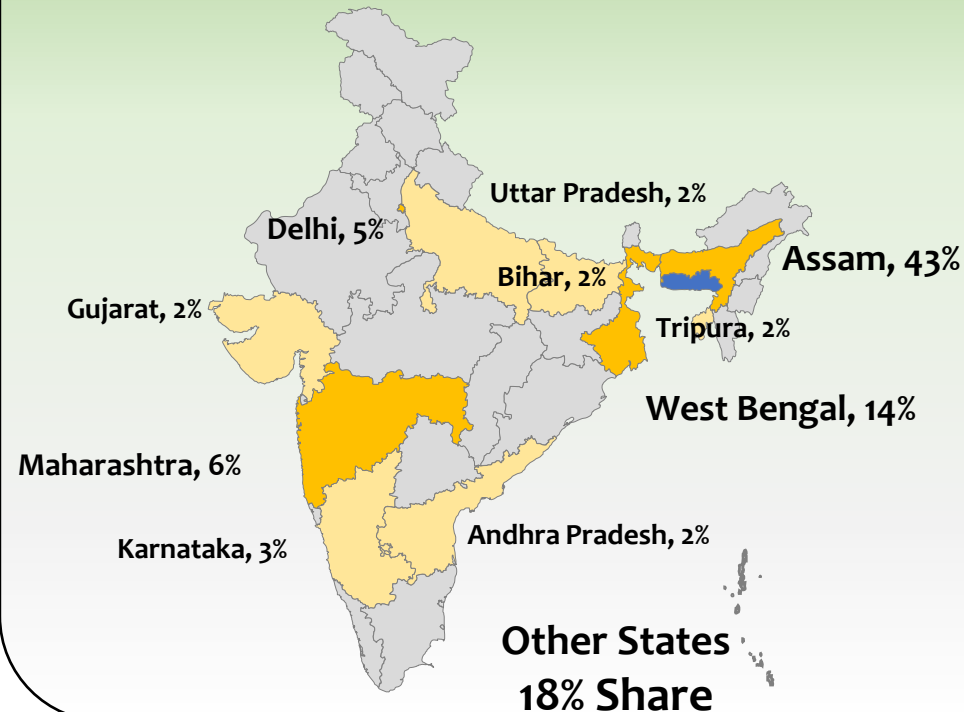
From year 2024 onwards we expect a year-on-year growth of ~10% in footfalls



Conservative target: ~20 Lakh Tourists by 2028

Domestic Visitation

International Visitation



Discover the Allure of Meghalaya

Embark on the Meghalayan Odyssey: Exploring Lush Ecosystems, Cultural Riches and Thrilling Adventures in Nature's Realm.



Waterfalls & Rivers

Cascading rivers, sprawling water bodies, hot water springs, plunging waterfalls dot the landscape of the State.

Home to one of India's cleanest river - Wah Umngot.

Home to the tallest plunge waterfall in India - Nohkalikai falls.



Music & Festivals

Shillong, the State's capital, is referred to as the **Rock Music capital of India**.

The colorful and vibrant festivals enable the state to **position itself as a yearlong tourism destination**.

Major Festivals:

1. Shad Suk Mynsiem
2. The Nongkrem dance festival.
3. 100 Drums Wangala festival



Adventure Tourism

Known for **trekking, boating, rafting / kayaking and caving**.

Also known for:

1. rock climbing,
2. paragliding,
3. zip lining,
4. mount. cycling
5. canoeing
6. Other

Krem Liat Prah in Jaintia Hills is the **longest cave in the sub continent, measuring 35 Kms in length**



Eco and Cultural Tourism

Art, culture and ways of life in villages and communities such as **Umden, Ri Bhoi (silk) and Larnai, West Jaintia Hills (pottery)**.

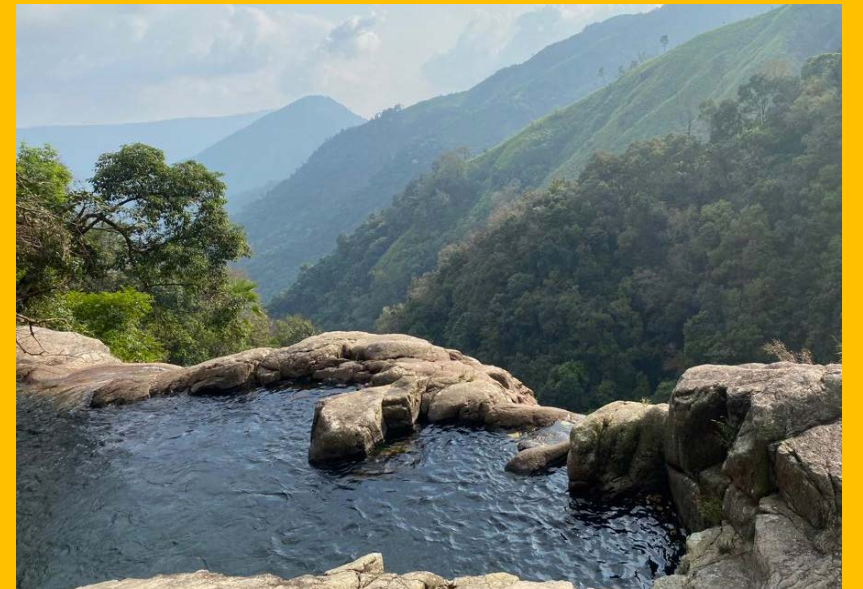
Home to the cleanest village - **Mawlynnong**

Unique Attractions:

1. The whistling village - Kongthong,
2. The double-decker living root bridge - Nongriat



Waterfalls & Rivers



Music Events



Adventure Tourism



Cultural Festivals and Cuisine



Tourism, a Catalyst for Economic Growth

Tourism is recognized as the **Growth Driver** for the State

Development of Tourism has a multiplier effect on:



- Construction
- Transport
- Agriculture
- Food processing
- Handicrafts
- Financial services

Tourism sector contribution to GSVA

₹ 1,850 crore
or \$ 0.19 bn

2023

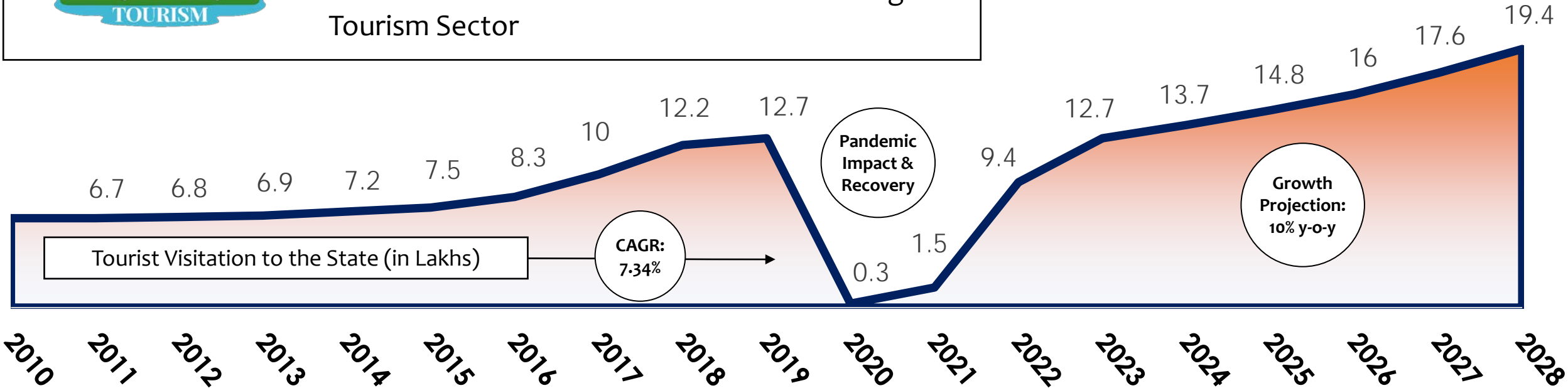


Target of
₹ 12,000 crore
or \$ 1.5 bn

2028



To reach this goal, the Tourism Department has undertaken several Initiatives for overhauling the Tourism Sector



Initiatives of the Tourism Department

The Meghalaya Tourism Policy 2023



Vision For the Tourism Sector

To position Meghalaya as a preferred tourism destination and harness the tourism potential of the State, thus driving growth, generating employment and entrepreneurship opportunities for individuals and communities while keeping sustainability at the core.

Thrust Areas for the Tourism Sector

- 1 Core & Auxiliary Infrastructure
- 2 Connectivity Infrastructure
- 3 Development of New Circuits
- 4 Capacity Building
- 5 Experiential Tourism
- 6 Promotion, Marketing & Branding
- 7 Private Sector Participation
- 8 Tourist Safety
- 9 Certification & Regulatory Framework

Promote high value - low volume tourism

Conservation - Heritage and Natural Assets

Waste Management

Sustainable & Responsible Tourism

Managing carrying capacity

Sustainable transportation

Encouraging low-impact tourism

Community Participation

Core Guiding Principles

Leveraging Technology

Convergence with GOI & State Schemes/Programs

Employment Generation & Entrepreneurship

Creating an enabling eco-system



Government Support & Initiatives

- I. CM – ELEVATE Schemes
 - a) Agro-tourism villa scheme
 - b) Meghalaya Motorcaravan Scheme
 - c) Meghalaya Tourism Homestay scheme
 - d) Prime Tourism Vehicle Scheme
- II. Meghalaya - Support for Tourism Event Programs (Music & Culture)
- III. The Meghalaya Grassroots Music Project
- IV. Meghalaya Tourism Development and Investment Promotion Scheme
- V. Green Meghalaya PES Scheme
- VI. Green Villa Scheme



Creating an enabling eco-system



Capacity Building

- I. Hotels under MTDC conduct in-house training sessions for employees.
- II. Collaboration with IHM and ITTM to conduct regular training programs for those engaged in the hospitality industry.
- III. Meghalaya State Skills Development Society (MSSDS) and village cooperatives carry out training programs for the vocations of tour guides, chefs, housekeeping, taxi operators and travel agents

Leveraging Technology

- I. Meghalaya Tourism App to unify Tourism services
- II. AR / VR Interventions
- III. Meghalaya tourism one stop portal for accommodation booking
- IV. Meghalaya tourism one stop portal for Data collection from accommodation units

Developing Home-stay Accommodation



Meghalaya Homestay Scheme: Promotion of tourism through creation of aesthetic homestays.



70% subsidy being provided to the citizens of state, thereby encouraging entrepreneurs to venture into the tourism sector.

~2500 Homestays to be developed in the state by 2028.



Building Experiences – Caving



Krem Mawmluh at Sohra (Cherrapunji)

- Of the many unique experience's Meghalaya has to offer, Caving is certainly one not to be missed.
- Krem Mawmluh at Sohra (Cherrapunji) is the fourth longest cave in the Indian subcontinent.

Package:

1. Duration is about 4 hours
2. Per pax cost INR 3300/-

All safety equipment is provided.



Guided tours



Limited Guests



Managed by youth
& Local community

A Robust System of Community Ownership

2,516

Cooperative Societies in Meghalaya



A federation of 25 nos. of village level primary cooperative societies was formed.

The Syrwet U Barim Mariang Jingkieng Jri Cooperative Federation Ltd, was formed to create employment avenues for villagers in the remote and far corners of the state.

Functions of the Federation

01

Conservation, Research and Development of Living Root Bridges.

02

Conserves and develops the flora and fauna of the surrounding sites and environment.

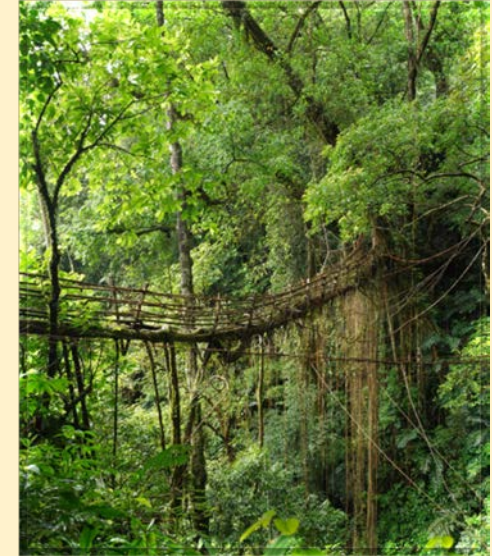
A Robust System of Community Ownership

The Government collaborates with traditional institutions through community consultation, utilizing community-owned land for tourism.

- The local youth is deployed as guides at the tourist sites.
- Visitors are required to avail the guide services to access the sites.
- The guides are trained in story-telling and engagement with the tourists.
- The guides encourage responsible behavior (ensure cleanliness, pick up any plastics on the way, providing education on flora & fauna).
- 10-15 groups of tourists (groups of 30) are allowed during the day, thereby maintaining carrying capacity norms.

Rangthylliang Living Root Bridge, Mawkyrnnot

Standing at 53 metres in length, this living root bridge is the longest of its kind in the entire world.



Package:

1. Rs. 1500 /- for a Half trek
2. Rs. 2000/- for a Full trek

(Per person cost Inc. Hiking Guide & Food)

Options for stay will be available in the coming months



Guided tours



Waste Conscious



Managed by Local community



Conservation



Limited Guests



Financially Viable

Building Experiences – Living Root Bridges

Enhancing the experience of the Living Roots bridge

NATURE TOURS TO LIVING ROOT BRIDGES



Building Experiences – Treks

Enhancing the Bamboo Trek in Wahkhen



Building Experiences – Nature Trails

Enhancing the experience of Nature trails



Hill Walking Through the Settlements

Trekking Trails

Mountain Biking Path

Bamboo Viewpoints



Experiential Centres and Curating Products



Community based Tourism



Developing
Experiential Centres
and Curating
Products

- Musician village at Wahkhen and Garo cultural experiential center

- Umden Silk experiential center

- Sohliya Strawberry Farm experience

- Learning center for pottery in Siju and Larnai

- Practice of beekeeping and making bitchi (local rice beer) in the Garo Hills region

Building experiences



RESIDENTIAL ARTISTS / MUSICIAN VILLAGE AT WAHKHEN

Development Components

- Residential Cottages
- Dormitories
- Rehearsal Halls
- Performance Space
- Souvenir Shop
- Collaborative spaces



**Core & Auxiliary Infrastructure
and
Private Sector Participation**

The Need for Core & Auxiliary Infrastructure



Why?

Infrastructure forms the basis for high-value and sustainable tourism

Developing high-value quality accommodation units

Developing Iconic Infrastructure

Improving Air and Road Connectivity



3 Days

Average Stay Period

Requirement of engaging activities and Iconic destinations to attract a range of tourists and prolong their stay to at **least 5 Days**



742

Accommodation Units

Requirement of:

- I. Large **Accommodation units built and operated by established brands and operators**
- II. Medium-sized properties operated by individual and community cooperatives
- III. Homestays operated by individual entrepreneurs



6,080

No. of rooms

51%

Occupancy

Requirement of **2X** the number of rooms i.e. **6000 additional rooms**



2,733

Average Room Rate

Requirement of **3000 rooms** charging more than INR 5000

Improving Connectivity and Transport – Air Connectivity



- Shillong airport at Umroi is connected with Delhi, Kolkata, Aizawl, Dimapur, Guwahati, Agartala, Dibrugarh, Imphal, Lilabari and Silchar.

In Progress

- I. Exploring possibility of connecting Shillong with either Dhaka or Sylhet, Bangladesh.
- II. Connecting Shillong with Bangkok to target the South-East Asian region.
- III. Helicopter services to Williamnagar, Dawki and Sohra.
- IV. Exploring greenfield airport or expansion of Umroi airport to cater to larger flights.
- V. Operationalize the Baljek airport in Tura to improve connectivity to Garo Hills.

Improving Connectivity and Transport – Road Connectivity



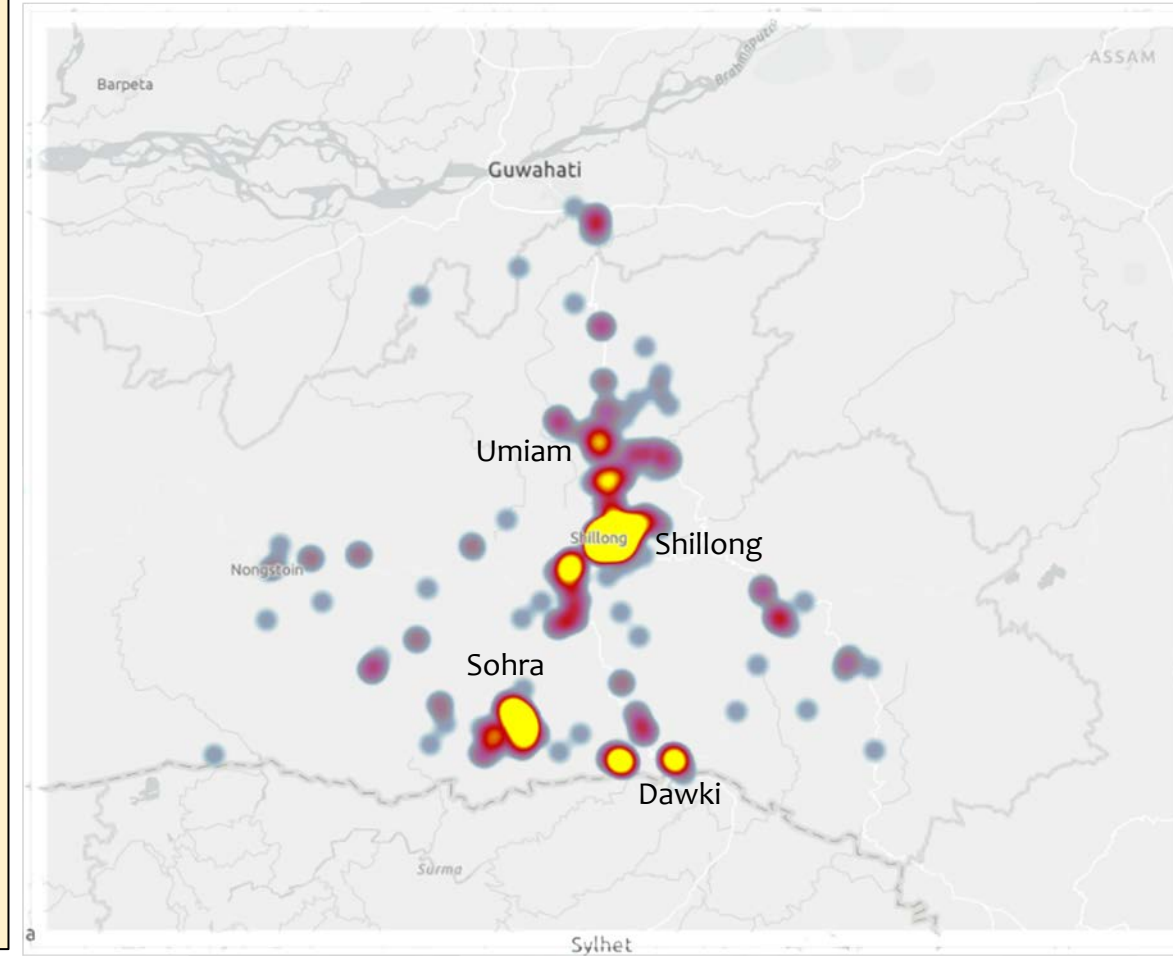
New Routes

- 1 **Bhutan Bangladesh India Nepal Corridor**
 - **Key Link in connecting Bangladesh with Bhutan**
 - Development of Jorabat – Shillong – Myllem – Dawki route
- 2 **Dhubri – Phulbari Bridge**
 - **Reduces travel distance from 200 Kms to 20 Kms**
 - Will improve the mobilization of goods and service
- 3 **Mahendraganj – Hilli Road**
 - **Reduces travel distance from 880 Kms to 85 Kms**
 - Will create the shortest link between the Northeast region and the rest of India
- 4 **Guwahati -Shillong-Dawki- Sylhet -Chitagong Highway**
 - **Reduces distance to nearest port from 880 Kms to 427 Kms**
 - Creates trade gateway for the Northeast

Development of Iconic Infrastructure - New Circuits

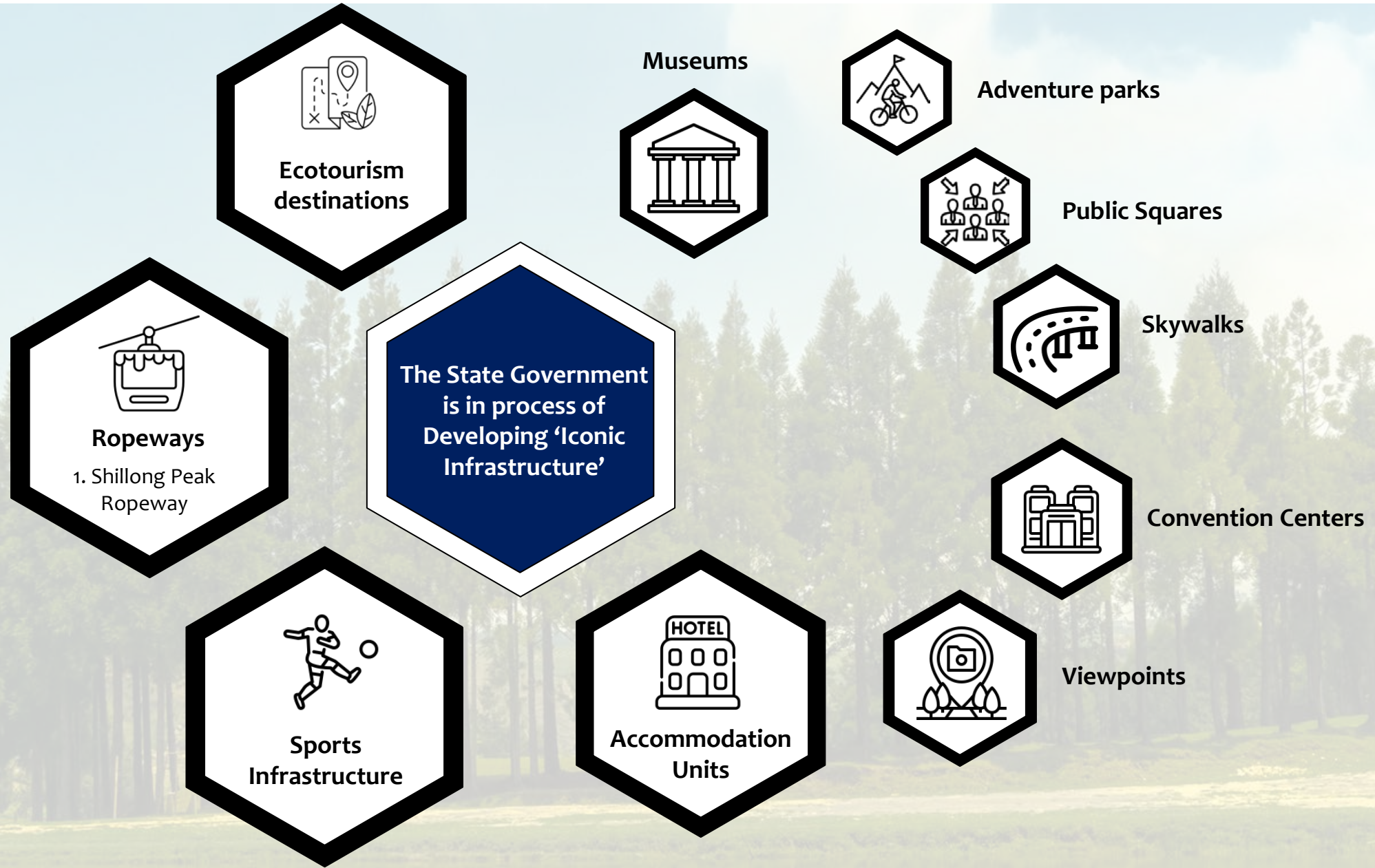


- Tourism in Meghalaya is currently concentrated around what can be called the North-South axis covering Umiam, Shillong and Sohra / Dawki.
- These destinations have most of the tourism facilities such as accommodation units and receive over 80% of the tourist footfall.
- This has led to enormous pressure on the existing resources and has also led to a regional imbalance in development.
- 90% of accommodation rooms are in the Umiam-Shillong-Sohra belt.



13 New Circuits have been identified in various locations in Meghalaya for the holistic development of Tourism.

Developing Iconic Infrastructure





Projects in Pipeline

Developing High Value Accommodation



Development of Water Centre in Sohra



Developing High Value Accommodation



Development of Hospitality Complex in Nongmahir



Developing High Value Accommodation



Luxury Resort Development at Mawlyndep



Developing High Value Accommodation



Sakaladuma Eco-resort



Developing Eco Accommodation



Mawlam Village



SITE PLAN

Phase I

1. Visitor center
2. Cabin type 1
3. Cabin type 2
4. Camping sites
5. View point area

Phase II & III

1. Gymnasium
2. Swimming pool
3. Open air theatre
4. Cabin type 1
5. Cabin type 2
6. Camping sites



Developing Eco Accommodation



JUNGLE LODGES AT NONGBLAI



NATURE BASED ECO RESORT AT WAHLYNGKHAT



Community based tourism – to be operated by the Village tourism cooperative society

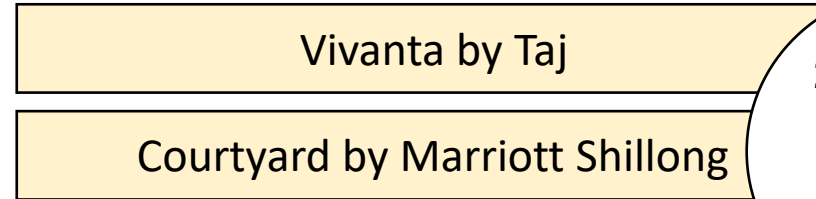


Private Sector Participation

Current Scenario of Luxury Accommodation in Meghalaya



To develop the 3000 keys with an ARR of more than INR 5000, the State Invites the Private Sector to Invest in the Hospitality Sector in the State.



2 Five Star Major Players in the State

In the year 2023, an average luxury accommodation unit in the State had observed.....

360 acres of land has been identified for private sector led development.

5-7 high value accommodation units with provision of ~1500-1800 keys.

Combined Project cost of INR ~2000 Crore.

The development comprises of:

- Budget Accommodations
- 5 Star resorts
- Convention Centers
- Premium eco cottages

₹ 9,000+
Average room rate in INR

🕒 50%
Occupancy rate 2023

₹ 4,700
RevPAR in INR

🏨 200+
No of Events Hosted

Investment Opportunities in Meghalaya

Investment in Tourism Sector

Private Investment

- Government opening up to Private players for Investment

Two Model of Investment

A. Govt Owned Land

Where land is owned by the Government

B. Govt Leased Land

Where land is leased by the Government from Community

Proposed List for Investment Opportunity

Govt Owned Land

- New Shillong
- Sohra
- Umiam (A)
- Umiam (B)
- Polo Orchid
- Mawpdang
- Khanapara

Govt Leased Land

- Shillong Peak
- Nokrek Biosphere

In process

- Meghalaya Theme Park

New Shillong Township – Mawdiangdiang



Resort/Hospitality Complex

Proposed Project



8.84 Acres

Land Availability

Latitude: 25.616145'N

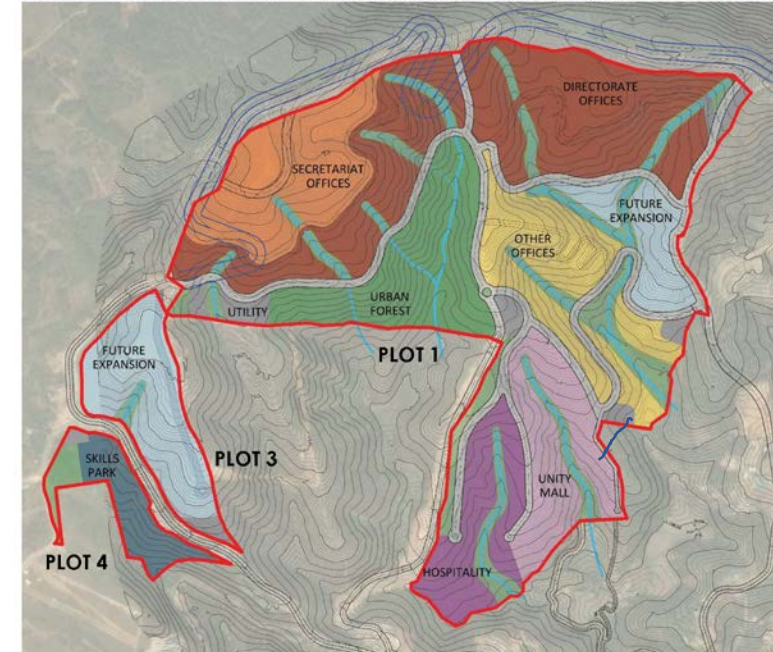
Longitude: 91.954842'E



100 - 200 Cr

Estimated Cost of Project

DRAFT MASTERPLAN – PLOT 1, 3 & 4 – Dated 23 Nov 2023



Rational for Investment

- Mawdiangdiang is Proposed as the New Administrative City and all Government Building to be Shifted here. Hence, there is a huge requirement for Resort and Hospitality Complex
- Lariti, IIM, NIFT, IT Park and other Major institutions already in place

Other Major Project Nearby

**Government Owned Land*

- Assembly hall under construction and expected to be completed by May 2024
- New Shillong Township Tender in progress

Sohra (Cherrapunji)



7 Star Hotel

Proposed Project



50 Acres

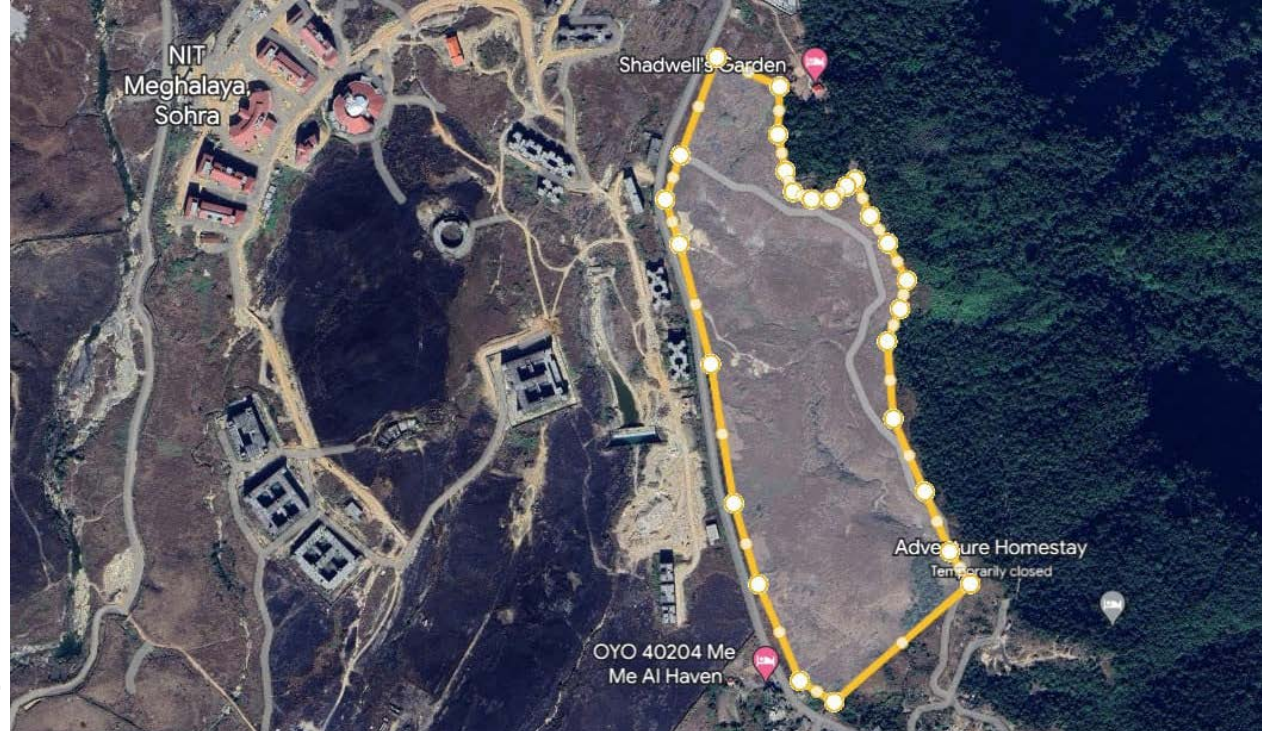
Land Availability

Latitude: 25.259985'N
Longitude: 91.747807'E



200 - 500 Cr

Estimated Cost of Project



**Government Owned Land*

Rational for Investment

- Sohra (Cherrapunji) is the most popular tourist destination besides Shillong with major tourist sites such as No Ka Likai falls, Noh Sngithiang Falls, Mawsmi Cave, Arwah Caves etc.

Other Major Project Nearby

- Proposed Hospitality Project covering 13 Acres in the same location.

Umiam – Location 1



Luxury Hotel

Proposed Project



14 Acres

Land Availability

Latitude: 25.6574685,
Longitude: 91.8878048



200 - 500 Cr

Estimated Cost of Project



Rational for Investment

- With Scenic views of the gentle lake, striking roads and bridges, the Umiam Lake is one of the most beautiful sight in the region with thousands of tourists visiting every single day. Hence, a Luxury hotel is imperative.
- Existing Govt owned Hotels, Water Sports Complex etc.

Other Major Project Nearby

**Government Owned Land*

- Proposed Luxury hotel & Renovation of existing Convention Centres etc. under NDB project worth about 70 Crores.

Umiam – Location 2



Luxury Hotel

Proposed Project



40 Acres

Land Availability

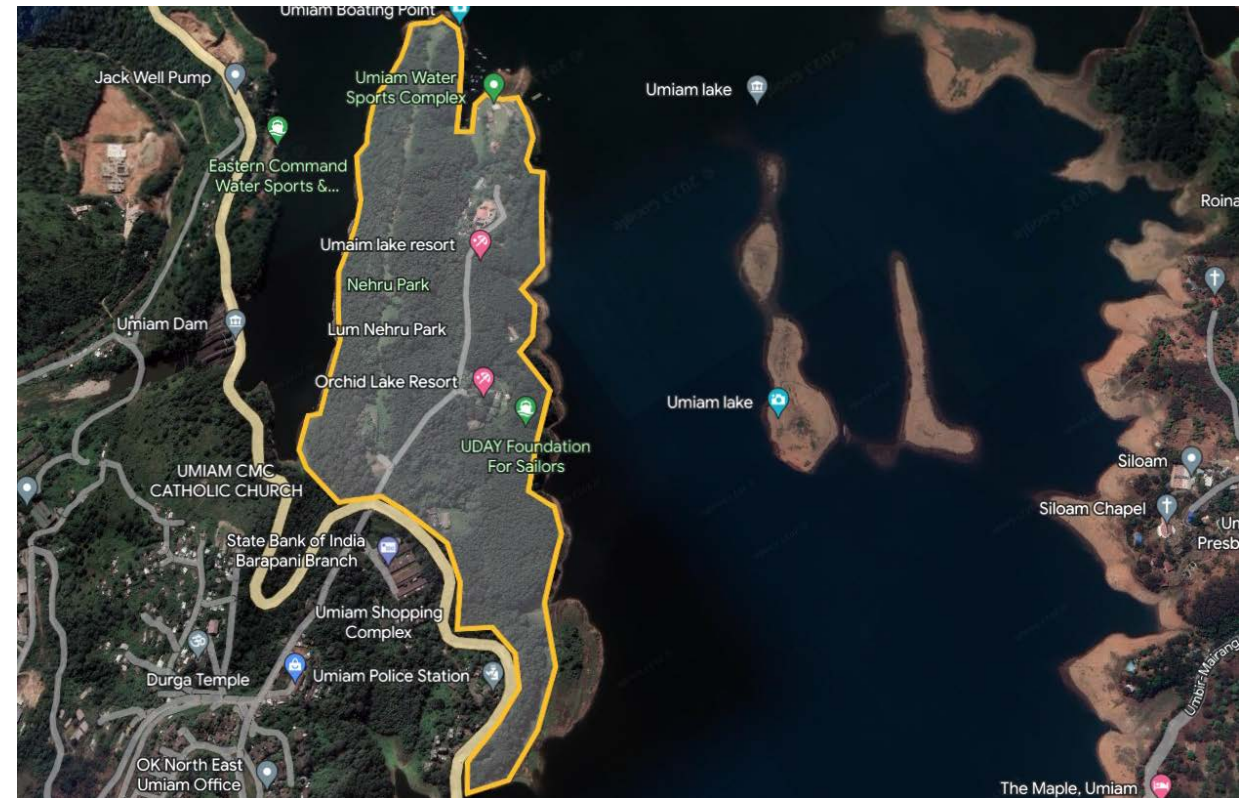
Latitude: 25.66152'N

Longitude: 91.898346'E



200 - 500 Cr

Estimated Cost of Project



**Government Owned Land*

Rational for Investment

- Similarly, there is another plot of land in the vicinity suitable for a Luxury hotel which can offer a serene view of the Lake.
- Existing Govt owned Hotels, Water Sports Complex etc.

Other Major Project Nearby

- Proposed Luxury hotel & Renovation of existing Convention Centres etc. under NDB project worth about 70 Crores.

Umiam – Location 3



Luxury Hotel

Proposed Project



36.78 Acres

Land Availability

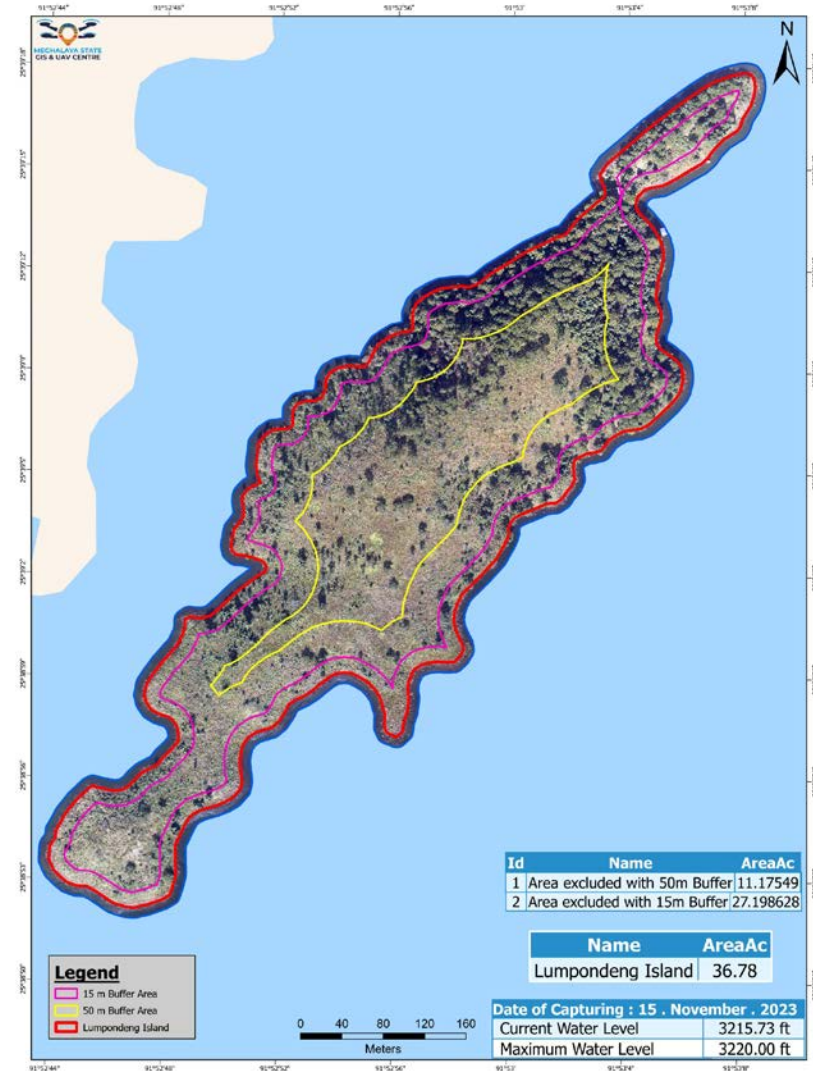


200 - 500 Cr

Estimated Cost of Project

Rational for Investment

- Existing Govt owned Hotels, Water Sports Complex etc.



*Government Owned Land

Mawpdang



Hospitality Project

Proposed Project



100 Acres

Land Availability

Latitude: 25.587116'N

Longitude: 91.990231'E



200 - 300 Cr

Estimated Cost of Project



Rational for Investment

- Mawpdang is a rather unique untapped potential, as it is located besides the only Airport in the State.
- It has major Institutions like ICAR Research Centre and post graduate college in the vicinity.
- About 15 mins from the Scenic Umiam Lake.

**Government Owned Land*

Other Major Project Nearby

- 850 Acres of Land acquired by the Government for the creation of Mawkhanu Knowledge City.

Mawkhanu Knowledge City



Hospitality & Tourism

Proposed Projects



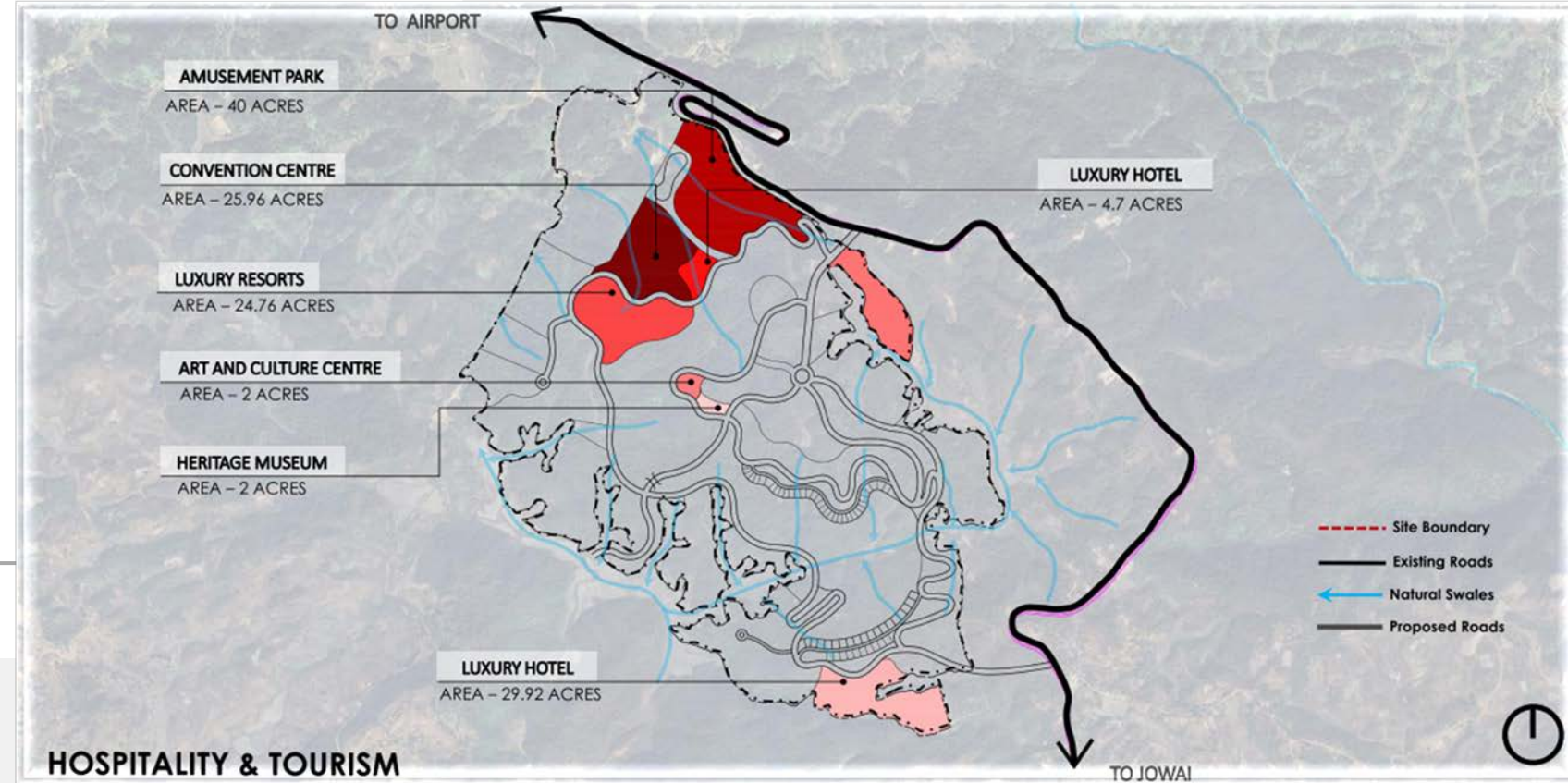
100+ Acres

Land Availability



500+ Cr

Estimated Cost of Project



Rational for Investment

- Considering the strategic location and the connectivity network in and around the proposed city, there is immense potential for few of the critical tourism segments i.e., MICE and Wedding Tourism.
- Due to its proximity to the Umroi airport, the proposed city is expected to serve as an alternate tourist hub in addition to Shillong city.

Khanapara



Hotel Complex

Proposed Project



7 Acres

Land Availability

Latitude: 26.650315'N

Longitude: 91.4929751'E



50 - 100 Cr

Estimated Cost of Project



Rational for Investment

- Residing at the Assam – Meghalaya border, just minutes away from Guwahati Railway Station, Khanapara is a busy junction with huge potential for setting up a Hotel for tourists visiting both Assam and Meghalaya.

**Government Owned Land*

Other Major Project Nearby

- Being right next to Guwahati City and Assam Secretariat, there are major hotels, institutes, commercial buildings in the area.

Shillong Peak



Hospitality Complex

Proposed Project



2.5 Acres

Land Availability

Latitude: 25.53168581'N

Longitude: 91.8512340'E



50 - 100 Cr

Estimated Cost of Project



**Government Leased Land*

Rational for Investment

- Placed at an altitude of 6,446 feet, Shillong Peak is the highest Peak in Meghalaya and a popular Tourist attraction.
- As is it located at a distance of about 13 Km from the Police Bazaar, creation of amenities at the View point is lucrative.

Other Major Project Nearby

- Ropeway Project worth Rs 160 Crores under NDB approved and under progress.

Nokrek National Park



Hotel

Proposed Project



180 Acres

Land Availability

Latitude: 25.484675'N
Longitude: 90.320171'E



50 - 100 Cr

Estimated Cost of Project

Rational for Investment

- Nokrek Biosphere which is in the list of UNESCO Biosphere Reserves attracts huge no. of tourist yearly.
- While numerous project have been taken up by the department including a 15 room resort, there is still a need to build a 50 room hotel to meet the increasing demand in the region.



**Government Leased Land*

Other Major Project Nearby

- Development of Eco Wellness Resort (Log Houses)
- Helicopter Landing Station proposed
- Construction of a Tourist Park with parking facilities and Electric Vehicle Charging Station

Meghalaya Theme Park



Theme Park

Proposed Project



Under Process

Land Availability

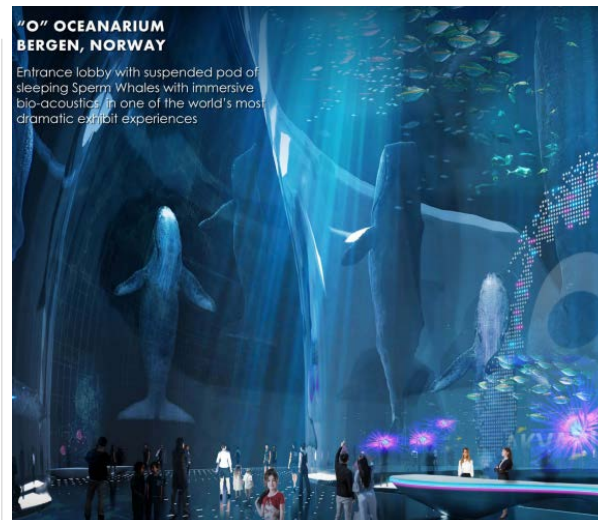


1,000 Cr

Estimated Cost of Project

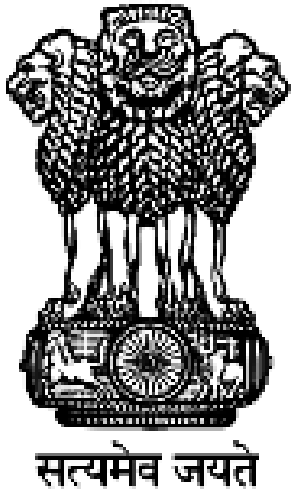
Rational for Investment

- Given Meghalaya's unique biodiversity ecosystem with renowned practices such as the living root bridge, the hon'ble Chief Minister proposed the creation of a unique theme park in Meghalaya



Other Similar Project Across the Globe

Our Partners in Growth



ASIAN DEVELOPMENT BANK



THE WORLD BANK
IBRD • IDA



**Thank you
Khublei
Mitela**