



Skills Gap Study of the **North-East**



Disclaimer:

National Skill Development Corporation (NSDC) engaged ICRA Management Consulting Services Limited (IMaCS) to prepare this report, which is based on independent research and analysis done by IMaCS. This report is not based or derived from any other report or research paper. Any similarity with any other paper may purely be a coincidence.

All rights reserved. All copyright in this report and related works is solely and exclusively owned by NSDC. The same may not be reproduced, wholly or in part in any material form (including photocopying or storing it in any medium by electronic means and whether or not transiently or incidentally to some other use of this report), modified or in any manner communicated to any third party except with the written approval of NSDC.

This report is for information purposes only. While due care has been taken during the compilation of this report to ensure that the information is accurate to the best of IMaCS' and NSDC's knowledge and belief, the content is not to be construed in any manner whatsoever as a substitute for professional advice.

IMaCS and NSDC neither recommend nor endorse any specific products or services that may have been mentioned in this report and nor do they assume any liability or responsibility for the outcome of decisions taken as a result of any reliance placed in this report.

Neither IMaCS nor NSDC shall be liable for any direct or indirect damages that may arise due to any act or omission on the part of the user due to any reliance placed or guidance taken from any portion of this report.

About National Skill Development Corporation

National Skill Development Corporation (NSDC) is a pioneering Public Private Partnership (PPP), set up under the aegis of the Ministry of Finance, in July 2008, with a mandate to skill 150 million by 2022.

NSDC's mission is as follows:

- Upgrade skills to international standards through significant industry involvement and develop necessary frameworks for standards, curriculum and quality assurance.
- Enhance, support and coordinate private sector initiatives for skill development through appropriate PPP models; strive for significant operational and financial involvement from the private sector.
- Focus on underprivileged sections of society and backward regions of the country thereby enabling a move out of poverty; similarly, focus significantly on the unorganised or informal sector workforce.
- Play the role of a 'market-maker' by bringing financing or viability gap funding, particularly in sectors where market mechanisms are ineffective or missing.
- Prioritise initiatives that can have multiplier or catalytic effect as opposed to one-off impact.

Globally, NSDC is a unique PPP in the area of skill development. NSDC's key differentiators are as follows:

- Funds as well as provides strategic support to the skill development activities of stakeholders and potential partners.
- Monitors implementation over entire life of the project.
- Enables skill development in high growth and unorganised sectors.
- Facilitates creation of 'Train the Trainer', centres
- Accountable for raising skills to international standards through sector specific industry involvement and setting systems and frameworks for standards, curriculum and quality assurance.
- Set up Sector Skill Councils
- Commissions periodic reports including skill gap surveys
- Support of industry associations, hence access to the best industry data enabling creation of industry specific curriculum, employability, etc.
- Facilitates creation of Labour Market Information Systems (LMIS)

Foreword

National Skill Development Corporation (NSDC) is a pioneering Public Private Partnership (PPP), set up under the aegis of the Ministry of Finance, in July 2008, with a mandate to skill 150 million persons by 2022.

NSDC's mission is as follows:

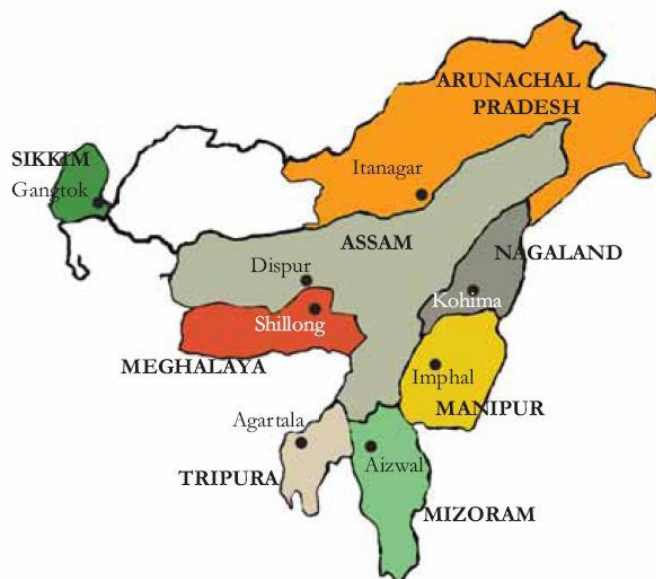
- Upgrade skills to international standards through significant industry involvement and develop necessary frameworks for standards, curriculum and quality assurance.
- Enhance, support and coordinate private sector initiatives for skill development through appropriate PPP models; strive for significant operational and financial involvement from the private sector.
- Focus on underprivileged sections of society and backward regions of the country thereby enabling a move out of poverty; similarly, focus significantly on the unorganised or informal sector workforce.
- Play the role of a 'market-maker' by bringing financing or viability gap funding, particularly in sectors where market mechanisms are ineffective or missing.
- Prioritise initiatives that can have multiplier or catalytic effect as opposed to one-off impact.

Globally, NSDC is a unique PPP in the area of skill development. NSDC's key differentiators are as follows:

- Funds as well as provides strategic support to the skill development activities of stakeholders and potential partners.
- Monitors implementation over entire life of the project.
- Enables skill development in high growth and unorganised sectors.
- Facilitates creation of 'Train the Trainer', centres
- Accountable for raising skills to international standards through sector specific industry involvement and setting systems and frameworks for standards, curriculum and quality assurance.
- Set up Sector Skill Councils
- Commissions periodic reports including skill gap surveys
- Support of industry associations, hence access to the best industry data enabling creation of industry specific curriculum, employability, etc.
- Facilitates creation of Labour Market Information Systems (LMIS)

Foreword

The North Eastern States comprise Arunachal Pradesh, Assam, Manipur, Meghalaya, Mizoram, Nagaland, Sikkim, and Tripura.



The eight States located in India's North-East cover an area of 2,62,179 sq. km. constituting 7.9 per cent of the country's total geographical area, and 46million people or about 4 per cent of the total population of the country (Census 2011).

Most North Eastern States have remained one of the under developed and untapped regions of the country. Some of the reasons are as follows:

- Remoteness and isolation because of being mostly landlocked
- Lack of access to markets
- Limited connectivity to the rest of India
- Limited infrastructure
- Challenges in land acquisition
- Widespread use of traditional cultivation methods that are inefficient
- Lack of facilities such as cold storage for warehousing fruits and transporting to market
- Inadequate infrastructure that could help transport goods from the region
- Difficulty in accessing bank credit for enterprises
- Lack of confidence in seeking credit by small and tiny sector enterprises

- Poor awareness of markets, changing demand patterns, raw material sourcing, technology, branding and quality standards
- High and widespread dependence on Governments' programmes for market access, subsidy and training
- Educated seeking, mostly, Government jobs or relocating out of the region
- Stigma against labour oriented jobs
- Dependence on, mainly, local market for selling products from small and tiny sector
- Inadequate telecommunications connectivity

Despite these disadvantages, there are success stories of entrepreneurs who have started on small scale, overcome the difficulties and have grown in the last 15-20 years to make a name for themselves in the region. Though small now, their number is likely to grow as more people travel outside the region, attain education, training and skills, investing is made attractive by the States, markets linkages are developed, substantial buyers are attracted to the products from the region and, trained and skilled persons can be gainfully employed within the region.

It is in this context that the North Eastern Council (NEC) and the Ministry of Development of North Eastern Region (DoNER) have prepared Vision 2020 for the North Eastern Region.

The Vision 2020 envisages the following targets by 2020:

- Overall GSDP growth at a CAGR of 11.64 per cent between 2007-09 and 2019-20.
- Overall per capita income growth of 12.95 per cent between 2007-09 and 2019-20.

To support this vision, the Ministry of Development of North Eastern Region has formulated a Strategic Plan 2010-16 focusing on three broad dimensions:

(A) Rapid socio-economic development:

- Facilitating preparation of Strategic Plans for key sectors such as Agriculture, Road, Civil Aviation, Railways, Inland Water Transport, Power, Tele-Communication & IT, HRD, Health and Handloom & Handicrafts and implementation of the Plans so prepared by the line-Ministries and North Eastern States.
- Facilitating formulation of Projects, Schemes and Programmes by major Central Ministries in consonance with the requirement of the North-Eastern Region.

- Increasing the effectiveness of developmental expenditure in the North-East Region through higher levels of transparency, systemic improvements and independent monitoring mechanism.
- Creating an in-house database on important socio-economic indicators in the Region and its periodic assessment.
- Facilitating preparation of Regional Plan by the NEC.
- Providing critical support to the NEC for identification of appropriate regional projects and their implementation.
- Facilitating funding by External Agencies in critical Sectors in the North Eastern States.
- Undertaking pilot or demonstration projects in the North-East Region in certain sectors to provide fillip to these sectors.

(B) Building capacities and competencies in critical sectors in the North Eastern States

- Preparation of a Plan of Action for building capacities and competencies in critical sectors in the North Eastern States.
- Identifying institutes and organizations for imparting training and building capacities in the North Eastern Region.
- Setting up of Training Institutes in the Region in important fields through line Ministries, NEC or States.
- Augmenting the capacity of the existing training institutes in the North Eastern States.
- Use of IT as a tool to upgrade skills.

(C) Promote the strengths of the Region

- Preparation of a 'Plan of Action' for projecting and promoting key strengths of the Region.
- Promoting student and cultural exchanges among the States of the Region on one hand and between the Region and the rest of the country.
- Organizing business summits, exhibitions and cultural festivals to promote the Region.
- Undertaking well-conceived promotional campaigns in the print and electronic media for projecting a positive image of the Region.
- Arranging festivals and cultural exchanges between the Region and the neighbouring countries.
- Highlighting the achievements and success stories from the Region in mainstream media.
- Instituting an Award Scheme to honour and showcase the achievements of talented people of the Region.

While this requires substantial investment, implementation of Action Agenda outlined in the Vision and Strategic Plan, it also requires imparting of skills at all levels.

The North Eastern States, clubbed together, have some common attributes. But they also have significant variations related to culture, language, values, work preferences and ethics, and overall environment related to Government, infrastructure, terrain, proximity to or availability of markets and services. Hence, the skilling interventions may vary across states and districts despite, similarities of activities.

Given the above background, ICRA Management Consulting Services Limited (IMaCS) has been mandated by the NSDC to assist in identifying development and employment potential of districts of North Eastern States.

Manipur is an oval shaped valley surrounded by nine hill ranges. Its altitude varies from 790 m above sea level in the valley to 2,020 m in the hills. It has sub-tropical climate. The State has been historically ruled by several kings as a tiny independent State. It came under British India in 1892 and is an Indian State since 1949.

The State is home to several ethnic groups presenting complex socio-economic structure. It accounts for 0.7 per cent of India's land area and 0.22 per cent of population. It has had a slow rate of urbanisation. Just about 25 per cent of population lives in urban areas.

Rural development programmes in the State include NREGS, SJGSY, SGRY, IAY, PMGY and PMGSY. Industrial development is extremely slow. Handloom and handicrafts is the only surviving industry apart from some SSI activity.



This report has been structured in three parts:

Part I includes Foreword, Acknowledgements, Approach and Methodology, and Study Limitations.

Part II concentrates on the diagnostic analysis of Manipur, human resources requirement, skill gaps assessed for Manipur.

Part III presents a detailed set of recommendation for Manipur.

Acknowledgements

Carrying out a large scale survey is always a challenge. However, this task was made easy for the team by the support that they received from various stakeholders. The team acknowledges, with grateful thanks, useful information, references and support provided by NSDC and Ministry of Development of North Eastern Region.

IMaCS team has travelled through the districts of Manipur to conduct the surveys for this study. The team has interacted with a cross-section of stakeholders. This survey exercise would not have been possible without the support of key stakeholders some of whom we have listed below.

- Mr. D.S. Poonia, Chief Secretary, Manipur
- Mr. O. Nabakishore Singh, Commissioner, Department of Commerce & Industries
- Mr. Munindra Singh, Director, State Planning Department
- Ms. Jacintha Lazarus, Deputy Commissioner, Churachandpur District
- Mr. R. K. Dinesh, Deputy Commissioner, Thoubal District
- Mr. T. Sithlou, Deputy Commissioner, Bishnupur District
- Mr. K.Lakshmi Kumar, Deputy Commissioner, Imphal East District
- Dr. W Gyaneshor Singh, Dean, Regional Institute of Medical Sciences
- Dr. Sarat Chandra, Administrative Head (Imphal), NIT
- Mr. M Lokendro Singh, Chief Engineer, PWD
- Mr. S Joykumar Singh, Managing Director, Manipur Industrial Development Corporation Ltd.
- Ms. Indira Oinam Singh, Head, Women's Income Generation Centre, Thoubal.

In addition, there are many persons or organisations who have contributed greatly towards the successful completion of this study. The team conveys sincere thanks to all of them for their generous support and contribution.

TABLE OF CONTENTS

About National Skill Development Corporation.....	3
Foreword.....	4
Foreword.....	5
Acknowledgements	10
<u>PART – I: Introduction</u>	18
1. Report Objectives	19
2. Approach and Methodology	19
3. Study Limitations	21
<u>PART – II (a): Diagnostic Analysis of Manipur</u>	22
4.1 Macro-Economic Overview	23
4.2 Industrial Activity Overview	27
4.3 Demography and Employment Overview	30
4.4 Government Policy Support	33
4.5 Infrastructure Overview	34
4.6 Key Findings from the Diagnostic Analysis.....	38
4.7 SWOT Analysis of Manipur.....	41
<u>PART – II (b): Identification of growth sectors</u>	42
5.1 Criteria for selecting growth sectors	43
5.2 Framework for identifying growth engines	43
5.3 Identified sectors for livelihood and local demand sectors	44
5.4 Identified sectors for migration	45
5.5 Type of skilling required in identified sectors	46
5.6 Type of skilling required in sectors identified for migration.....	47
<u>PART – II (c): District level Analysis of Manipur</u>	48
6.1.Bishnupur	49
6.1.1 Economy	49
6.1.2Demography	49
6.1.3Infrastructure	49
6.1.4 Employment Pattern	50
6.1.5 Potential sectors in district	50
6.2 Chandel	51

6.2.1 Economy	52
6.2.2Demography	52
6.2.3Infrastructure	52
6.2.4 Employment Pattern	53
6.2.5 Potential sectors in district	53
6.3 Churachandpur	54
6.3.1 Economy	54
6.3.2Demography	54
6.3.3Infrastructure	54
6.3.4 Employment Pattern	55
6.3.5 Potential sectors in district	55
6.4 Imphal (West and East).....	56
6.4.1 Economy	57
6.4.2Demography	57
6.4.3Infrastructure	57
6.4.4 Employment Pattern	59
6.4.5 Potential sectors in district	59
6.5 Senapati.....	61
6.5.1 Economy	61
6.5.2Demography	61
6.5.3Infrastructure	62
6.5.4 Employment Pattern	63
6.5.5 Potential sectors in district	63
6.6 Tamenglong.....	64
6.6.1 Economy	64
6.6.2Demography	64
6.6.3Infrastructure	64
6.6.4 Employment Pattern	65
6.6.5 Potential sectors in district	66
6.7 Thoubal	66
6.7.1 Economy	66
6.7.2Demography	66

6.7.3Infrastructure	67
6.7.4 Employment Pattern	68
6.7.5Potential sectors in district	68
6.8 Ukhrul	69
6.8.1 Economy	69
6.8.2Demography	69
6.8.3Infrastructure	69
6.8.4 Employment Pattern	70
6.8.5 Potential sectors in district	71
<u>PART – II (d): Skill Gap Analysis</u>	72
7.1Handloom and Handicraft	73
7.1(a) Skill mapping and gap analysis in handloom and handicraft.....	75
7.2Food and food processing	77
7.2(a) Food and food processing	77
7.2(b) Skill mapping and gap analysis in food and processing industry.....	82
7.3Hotels	85
7.3(a) Skill mapping and gap analysis in tourism and hospitality.....	86
7.4IT and Software	88
7.4(a) Skill mapping and gap analysis in IT and Software	88
7.5Fisheries	90
7.5(a) Skill mapping and gap analysis in fishery	91
7.6 Construction	92
7.6(a) Skill mapping and gap analysis in construction	92
7.7 Border Trade	93
7.7(a) Skill mapping and gap analysis in border trade	94
7.7 Other potential sectors	94
<u>PART – II (e): Forecasting of Human Resource Requirement</u>	96
8.1 Human resource forecasting model	97
8.2 Incremental demand in Manipur.....	98
8.3 District-wise human resource requirement in Manipur – 2011-21	99
8.4 Stakeholder feedback	101
<u>PART – III: Recommendations</u>	104

9.1 Interventions for human resource Demand-Supply gap management	105
9.2 Areas for skilling within state – 2011-21	106
9.3 Skilling for migration.....	110
9.4 Capacity creation within State.....	111
9.5 Private sector skill development opportunities at the district level	112
9.5 Key interventions for Manipur	127
<u>Annexure</u>	128
1. Methodology used for Demand projections	129
2. List of Abbreviations	130
3. List of people met in Manipur	131
4. Manipur – List of Handicrafts Clusters.....	134
5. Training Capacity of Vocational Education in Manipur	135
About ICRA Management Consulting Services Limited	136

LIST OF TABLES

TABLE 1: COMPARISON OF GROSS STATE DOMESTIC PRODUCT	23
TABLE 2: COMPARISON OF MANIPUR'S PER CAPITA INCOME WITH INDIA AND NER	26
TABLE 3: DISTRICT WISE PRODUCTION AND INVESTMENT.....	27
TABLE 4: SECTOR WISE DISTRIBUTION OF ENTERISES AND EMPLOYMENT IN MANIPUR	28
TABLE 5: COOPERATIVE SOCIETIES	29
TABLE 6: DISTRICT DEMOGRAPHIC PROFILE OF MANIPUR	30
TABLE 7: POPULATION BY AGE-GROUPS	31
TABLE 8: DISTRIBUTION OF MAIN WORKERS BY PROFESSION.....	32
TABLE 9: DISTRICT WISE INDUSTRIAL DEVELOPMENT PLAN	34
TABLE 10: ROAD LENGTH IN MANIPUR	35
TABLE 11: TELECOM INFRASTRUCTURE	36
TABLE 12: EDUCATION INFRASTRUCTURE.....	36
TABLE 13: HEATH INFRASTRUCTURE	37
TABLE 14: AVAILABILITY OF WATER, SANITATION AND LIGHTING.....	37
TABLE 15: UPCOMING INDUSTRIAL INFRASTRUCTURE IN MANIPUR	38
TABLE 16: SHORTLISTED SECTORS	44
TABLE 17: SHORTLISTED SECTORS	45
TABLE 18: SKILLING REQUIRED.....	46
TABLE 19: TYPE OF SKILLING REQUIRED FOR MIGRATION.....	47
TABLE 20: INFRASTRUCTURE FACILITIES IN BISHNUPUR.....	49
TABLE 21: EDUCATION INFRASTRUCTURE IN BISHNUPUR.....	50
TABLE 22: INFRASTRUCTURE FACILITIES IN CHANDEL	52
TABLE 23: EDUCATION INFRASTRUCTURE IN CHANDEL	53
TABLE 24: INFRASTRUCTURE FACILITIES IN CHURACHANDPUR	54
TABLE 25: EDUCATION INFRASTRUCTURE IN CHURACHANDPUR	55
TABLE 26: INFRASTRUCTURE FACILITIES IN IMPHAL EAST	57
TABLE 27: INFRASTRUCTURE FACILITIES IN IMPHAL WEST	58
TABLE 28: EDUCATION INFRASTRUCTURE IN IMPHAL EAST	58
TABLE 29: EDUCATION INFRASTRUCTURE IN IMPHAL WEST.....	58
TABLE 30: INFRASTRUCTURE FACILITIES IN SENAPATI.....	62
TABLE 31: EDUCATION INFRASTRUCTURE IN SENAPATI.....	62
TABLE 32: INFRASTRUCTURE FACILITIES IN TAMENGLONG	64
TABLE 33: EDUCATION INFRASTRUCTURE IN TAMENGLONG.....	65
TABLE 34: INFRASTRUCTURE FACILITIES IN THOUBAL	67
TABLE 35: EDUCATION INFRASTRUCTURE IN THOUBAL	67
TABLE 36: INFRASTRUCTURE FACILITIES IN UKHRUL	70
TABLE 37: EDUCATION INFRASTRUCTURE IN UKHRUL	70
TABLE 38: DISTRICT WISE PLANTS GROWN.....	80
TABLE 39: COMPARATIVE YIELD PER HECTARE AND SHARE AT ALL-INDIA LEVEL	81
TABLE 40: WELL-KNOWN TOURIST SPOTS IN MANIPUR.....	85
TABLE 41: TOURIST ARRIVALS IN MANIPUR	86
TABLE 42: MANIPUR - FISHERY	90
TABLE 43: FACILITIES AT INTEGRATED CHECK POST	93
TABLE 44: MANIPUR'S DISTRICT WISE INCREMENTAL HUMAN RESOURCES REQUIREMENT: 2011-2021	100
TABLE 45: STAKEHOLDER FEEDBACK.....	101
TABLE 46: SKILL LEVEL WISE HUMAN RESOURCE REQUIREMENT IN BISHNUPUR.....	113
TABLE 47: SKILL LEVEL WISE HUMAN RESOURCE REQUIREMENT IN CHANDEL	115
TABLE 48: SKILL LEVEL WISE HUMAN RESOURCE REQUIREMENT IN CHURACHANDPUR	117
TABLE 49:SKILL LEVEL WISE HUMAN RESOURCE REQUIREMENT IN IMPHAL WEST	119
TABLE 50: SKILL LEVEL WISE HUMAN RESOURCE REQUIREMENT IN IMPHALEAST	120
TABLE 51: SKILL LEVEL WISE HUMAN RESOURCE REQUIREMENT IN SENAPATI.....	121

TABLE 52: SKILL LEVEL WISE HUMAN RESOURCE REQUIREMENT IN TAMENGLONG.....	123
TABLE 53: SKILL LEVEL WISE HUMAN RESOURCE REQUIREMENT IN THOUBAL	125
TABLE 54: SKILL LEVEL WISE HUMAN RESOURCE REQUIREMENT IN UKHRUL	126

LIST OF FIGURES

FIGURE 1: GROSS STATE DOMESTIC PRODUCT	23
FIGURE 2: PERCENTAGE DISTRIBUTION OF GROSS STATE DOMESTIC PRODUCT	24
FIGURE 3: SECTOR-WISE DISTRIBUTION OF GROSS STATE DOMESTIC PRODUCT	25
FIGURE 4: DISTRICT DOMESTIC PRODUCT	25
FIGURE 5: DISTRICT WISE PER CAPITA INCOME IN MANIPUR	26
FIGURE 6: REGISTERED MANUFACTURING UNITS	27
FIGURE 7: OAEs AND ESTABLISHMENTS IN MANIPUR	28
FIGURE 8: MAIN AND MARGINAL WORKERS	32
FIGURE 9: THRUST AREAS IDENTIFIED UNDER DRAFT INDUSTRIAL AND INVESTMENT POLICY, 2011	33
FIGURE 10: TOTAL INSTALLED CAPACITY	35
FIGURE 11: EMPLOYMENT PATTERN IN BISHNUPUR DISTRICT	50
FIGURE 12: EMPLOYMENT PATTERN IN CHANDEL DISTRICT	53
FIGURE 13: EMPLOYMENT PATTERN IN CHURACHANDPURDISTRICT	55
FIGURE 14: EMPLOYMENT PATTERN IN IMPHALEAST DISTRICT	59
FIGURE 15: EMPLOYMENT PATTERN IN IMPHAL WEST DISTRICT	59
FIGURE 16: EMPLOYMENT PATTERN IN SENAPATI DISTRICT	63
FIGURE 17: EMPLOYMENT PATTERN IN TAMENGLONG DISTRICT	65
FIGURE 18: EMPLOYMENT PATTERN IN THOUBAL DISTRICT	68
FIGURE 19: EMPLOYMENT PATTERN IN UKHRULDISTRICT	71
FIGURE 20: BUSINESS PRACTICES IN MANIPUR'S HANDLOOM & HANDICRAFTS SECTOR	74
FIGURE 23: HUMAN RESOURCES FORECASTING MODEL.....	97
FIGURE 22: HUMAN RESOURCES REQUIREMENT IN MANIPUR.....	98
FIGURE 23: DEMAND AND SUPPLY OF HUMAN RESOURCES IN MANIPUR	99
FIGURE 24: DEMAND-SUPPLY OF HUMAN RESOURCES IN MANIPUR – 2011-21	105
FIGURE 25: AREAS FOR SKILLING WITHIN STATE BETWEEN 2011 AND 2021.....	106
FIGURE 26: AREAS FOR SKILLING FOR DEMAND SECTORS IDENTIFIED WITHIN MANIPUR	107
FIGURE 27: LIVELIHOOD ACTIVITIES IN MANIPUR WHICH NEED SKILL UP-GRADATION	108
FIGURE 28: AREAS FOR SKILLING FOR MIGRATION TO OTHER STATES OR OVERSEAS.....	110
FIGURE 29: INTERVENTION FOR CAPACITY CREATION WITHIN THE STATE	111

PART – I: Introduction

1. Report Objectives

National Skill Development Corporation (NSDC) has mandated ICRA Management Consulting Services Limited (IMaCS) to assess the development and employment generation potential of eight North Eastern states of India. As per the Terms of Reference, the report objectives are as follows:

- i. Review the socio-economic profile of the North Eastern Region
- ii. Identify developmental opportunities keeping in mind factor endowments and stakeholder perspectives
- iii. Identify specific developmental initiatives/projects which also have impact on employment generation
- iv. Assess skills required to aid in such employment generation
- v. Suggest suitable interventions/recommendations to achieve the same at a regional level

2. Approach and Methodology

The study has been conducted in three phases:

Phase – 1: Diagnostic Phase

The objective of this phase was to understand the socio-economic profile of the North Eastern Region. The focus was on analyzing the economic and social position of the Region based on evolution of the level and type of economic activity and social development in each State. The factor advantages, constraints facing the Region either due to Regional factors or common among the states, and the challenges going forward have been analysed. We have thus identified the factor endowments of the State and the potential it holds. At the end of this stage, we have presented a snapshot of the State on economic and social aspects and a SWOT analysis of the State.

Phase – 2: Synthesis Phase

This was carried-out in two modules:

Module 1: Assessment of Development Potential

Module 2: Assessment of Employment Potential and Gaps

Module 1: Assessment of Development Potential:

The objective of this phase was to identify development opportunities across formal and informal sectors which provide livelihood opportunities for employment. We have also kept in mind the opportunities for

employment/livelihood generation identified as per the Vision 2020. This leads to the framework for identification of formal and informal sector employment/skilling opportunities

For this exercise, we have interacted with a cross-section of stakeholders of the Government/Industry to understand the following:

- What are the key developmental areas to focus?
- What needs to be done to leverage key strengths and factor endowments?
- How can bottlenecks to development be cleared?
- What various stakeholders need to do for development?

Based on the factor endowments and primary surveys conducted, we have identified potential and high growth opportunities for North Eastern States.

Module 2: Assessment of Employment Potential

For the developmental opportunities identified, we have assessed the following:

- Employment potential in the Region and on account of these identified developmental opportunities
- Skills required to be developed among the North Eastern Region workforce to tap into the same.

This phase has been executed by: Profiling skills required sustaining traditional skills and tapping into factor endowments, especially in the informal sector (wherever scalable) and Interacting with industry (small, medium and large) and groups engaged in formal and informal sectors.

Phase – 3: Recommendations

Our interventions focus on various measures/potential ideas/projects required to be pursued for Development and Employment Generation. These interventions focus on the following:

- What is the enabling environment to be created to further development and employment generation?
- What are the interventions to enhance employment generation/job creation?
- What are the potential opportunities that can be tapped thereof and structured for private sector investment and NSDC interventions?

The report derives content for analyses from both, primary survey and secondary sources.

- The surveys were undertaken by visiting several districts of Arunachal Pradesh, Assam, Manipur, Meghalaya, Mizoram, Nagaland, Sikkim and Tripura and meeting key stakeholders identified with the help of State/District Government Departments of Labour, Planning or Industries and using internal research and databases.
- Significant secondary research was also carried out in order to validate the findings of primary survey.

3. Study Limitations

While care has been taken to ensure correctness of information, the report outcomes for entire North East are affected by the following circumstances:

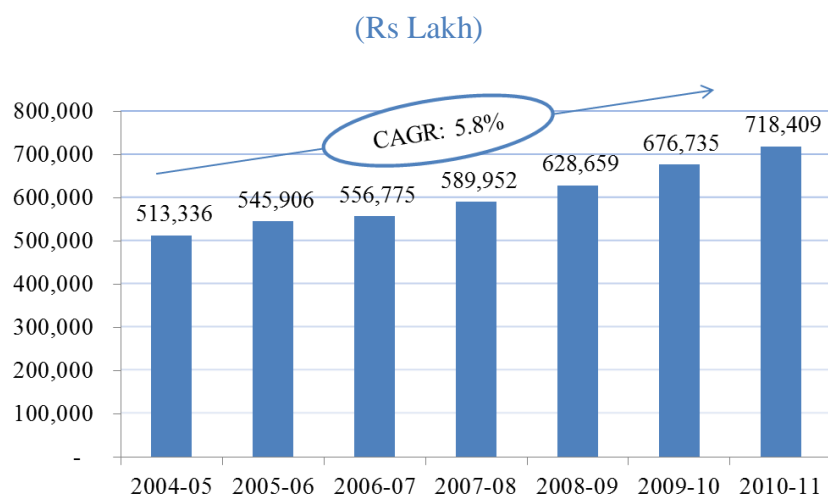
- While the field survey has been conducted keeping in mind maximum coverage, the survey has been constrained by factors such as - weather: a major part of the survey was conducted in the rainy season with landslides and flooding; availability of transportation; proper road connectivity; availability of persons to interview at select locations and offices; lack of documented and latest information; and inaccessible distances from within a State.
- While some states had updated statistics, for others approximations have been made because of dated or non-existent data, particularly, for industries and institutions that have come up in recent years.
- Approximations include use of past growth rates for projections, regional average, national average, productivity growth, benchmarks with other states and others.

PART – II (a): Diagnostic Analysis of Manipur

4.1 Macro-Economic Overview

As of 2010-11, Manipur had a Gross State Domestic Product (GSDP) of Rs7,184 crore. It has increased at a CAGR of 5.8 per cent between 2004-05 and 2010-11. The growth in Manipur's GSDP has been lower than All-India average of 8.6 per cent and North East Region average of 6.3 per cent in the same period.

FIGURE 1: GROSS STATE DOMESTIC PRODUCT



Source: Central Statistical Organisation, Ministry of Programme Implementation & Statistics; IMaCS Analysis

TABLE 1: COMPARISON OF GROSS STATE DOMESTIC PRODUCT

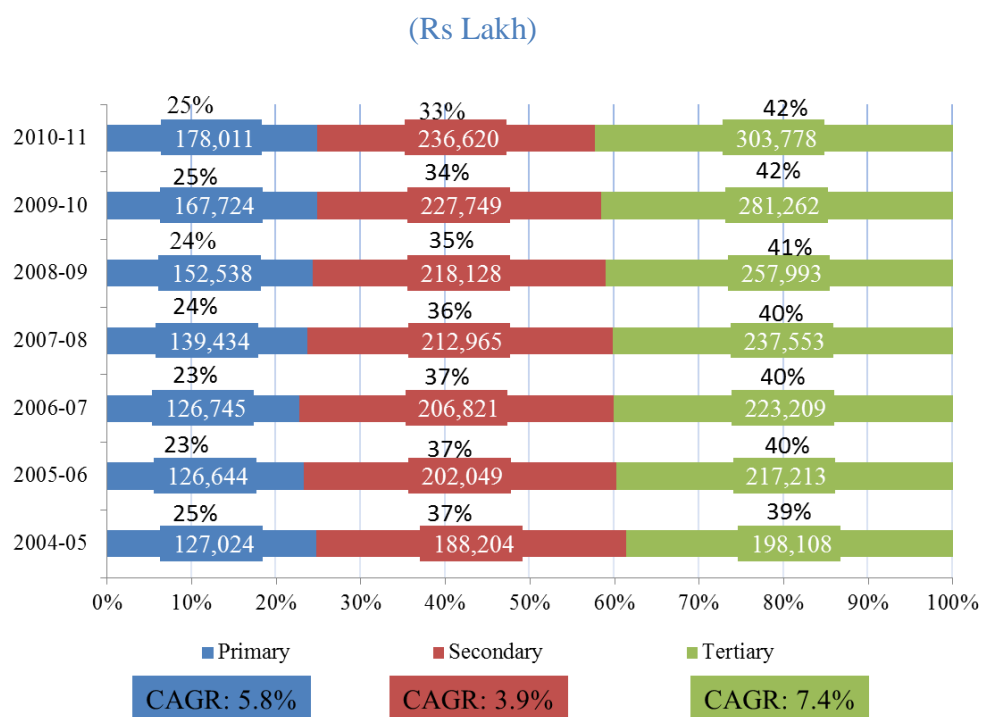
Country / Region/ State	GSDP, Rs. Lakh 2009-2010	GSDP Growth Rate, 2004-2010
India	429,139,359	8.6%
North East Region*	11,923,969	6.3%
Manipur	676,739	5.8%

Source: Central Statistical Organisation, Ministry of Programme Implementation & Statistics; IMaCS Analysis

* Aggregation of GSDP of all eight North Eastern States.

The tertiary sector makes the biggest contribution to GSDP, at 42 per cent. It is followed by secondary sector at 33 per cent and primary sector at 25 per cent. Between 2004-05 and 2010-11, the contribution of primary sector has remained stagnant, while the contribution of secondary sector has decreased from 37 per cent to 33 per cent. Contribution of tertiary sector, however, has increased from 39 per cent to 42 per cent because of transport and communications.

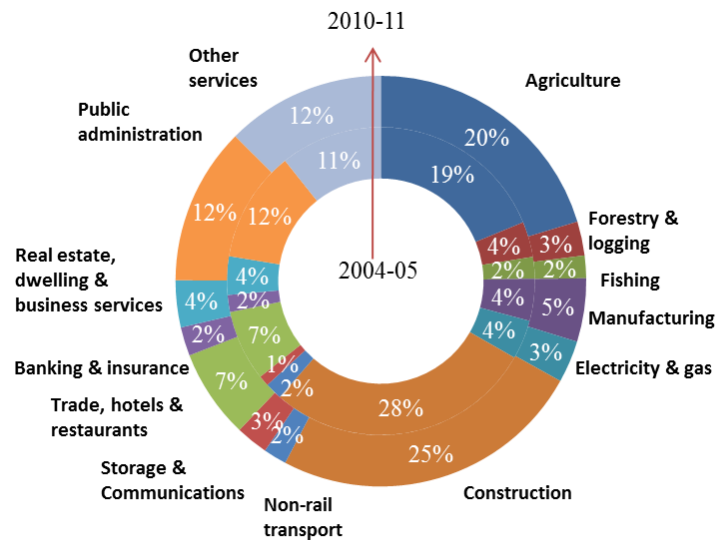
FIGURE 2: PERCENTAGE DISTRIBUTION OF GROSS STATE DOMESTIC PRODUCT



Source: Central Statistical Organisation, Ministry of Programme Implementation & Statistics; IMaCS Analysis

Sector wise break-up of GSDP for 2010-11 indicates that construction, followed by agriculture is the biggest contributor to Manipur's GSDP. Manufacturing plays a small role in Manipur's economy. Its share has increased from 4 per cent in 2004-05 to 5 per cent in 2010-11.

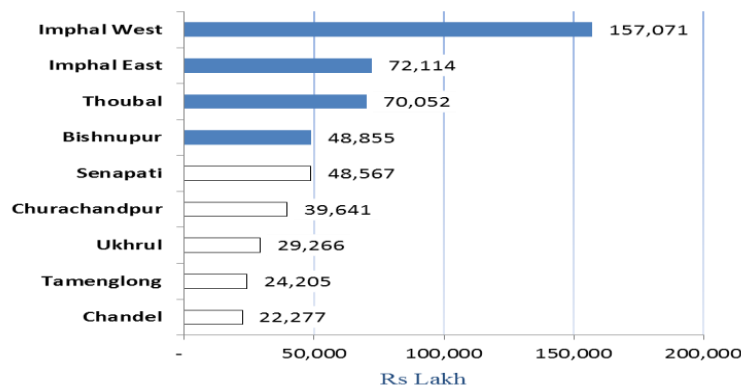
FIGURE 3: SECTOR-WISE DISTRIBUTION OF GROSS STATE DOMESTIC PRODUCT



Source: Central Statistical Organisation, Ministry of Programme Implementation & Statistics; IMAcS Analysis

Imphal (West and East) is the biggest contributor to Manipur’s GSDP. Ukhrul, Tamenglong and Chandel, have smaller share. Imphal, Thoubal and Bishnupur, together, contribute about 70 per cent to GSDP

FIGURE 4: DISTRICT DOMESTIC PRODUCT (Rs Lakh)



Source: Statistical Abstract, Manipur, 2009; Directorate of Economics and Statistics, Government of Manipur, 2005-06

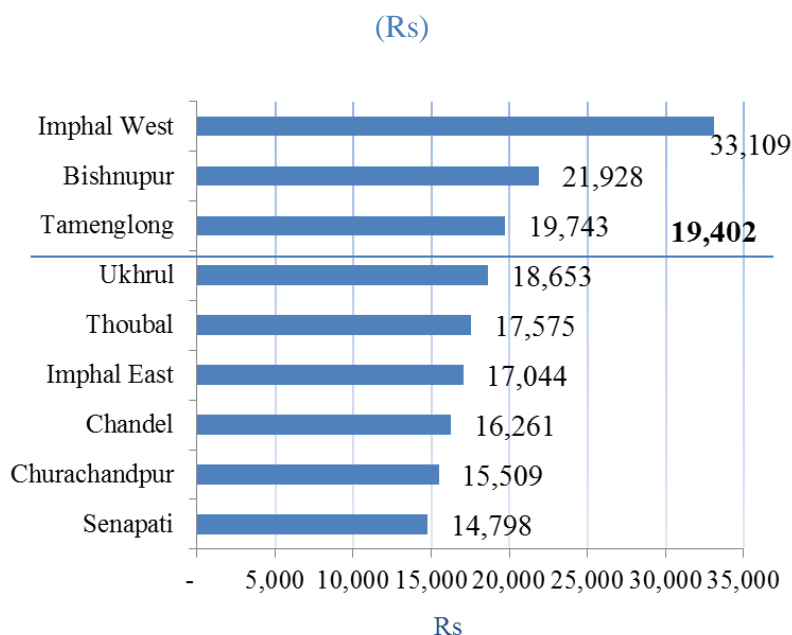
As of 2009-10, Manipur had a per capita income of Rs 29,684, which is lower than both the India average of Rs54,835, and the North East Region (NER) average of Rs46,359. Imphal West has the highest per capita income, followed by Bishnupur and Tamenglong. Senapati district has the lowest per capita income, as compared to other districts of Manipur.

TABLE 2: COMPARISON OF MANIPUR’S PER CAPITA INCOME WITH INDIA & NER

Country / Region/ State	Per capita income, Rs, 2009-10
India	54,835
North East Region	46,359
Manipur	29,684

Source: Central Statistical Organisation, Ministry of Programme Implementation & Statistics; IMaCS Analysis

FIGURE 5: DISTRICT WISE PER CAPITA INCOME IN MANIPUR

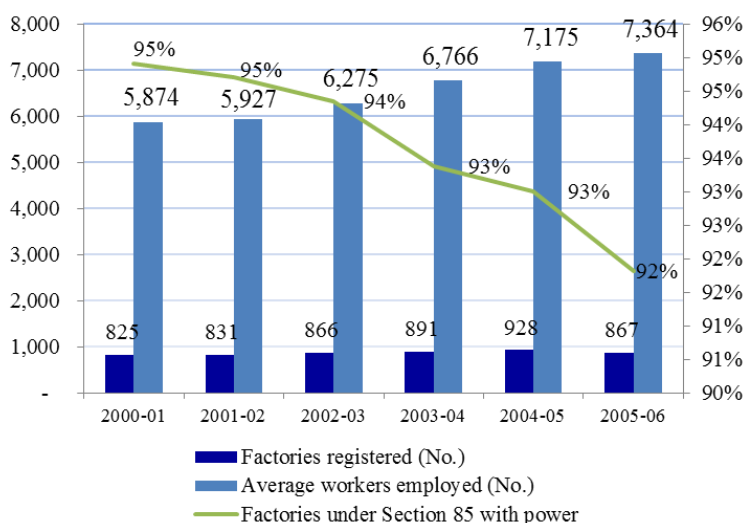


Source: Statistical Abstract, Manipur, 2009; Directorate of Economics and Statistics, Government of Manipur, 2005-06; MOSPI

4.2 Industrial Activity Overview

During 2005-06, 867 factories were registered, employing 7,364 persons. About 92 per cent of them had access to power. District wise data shows that maximum production was in the Imphal East district at Rs 291 lakh at an investment of Rs 40 lakh.

FIGURE 6: REGISTERED MANUFACTURING UNITS



Sources: Statistical Abstract Manipur, 2009; IMaCS Analysis

Over 90 per cent of units were in the tiny sector. There were about eight workers employed per registered factory. Imphal and Thoubal districts accounted for over 88 per cent of the total production of manufactured goods and 96 per cent of investment, by value.

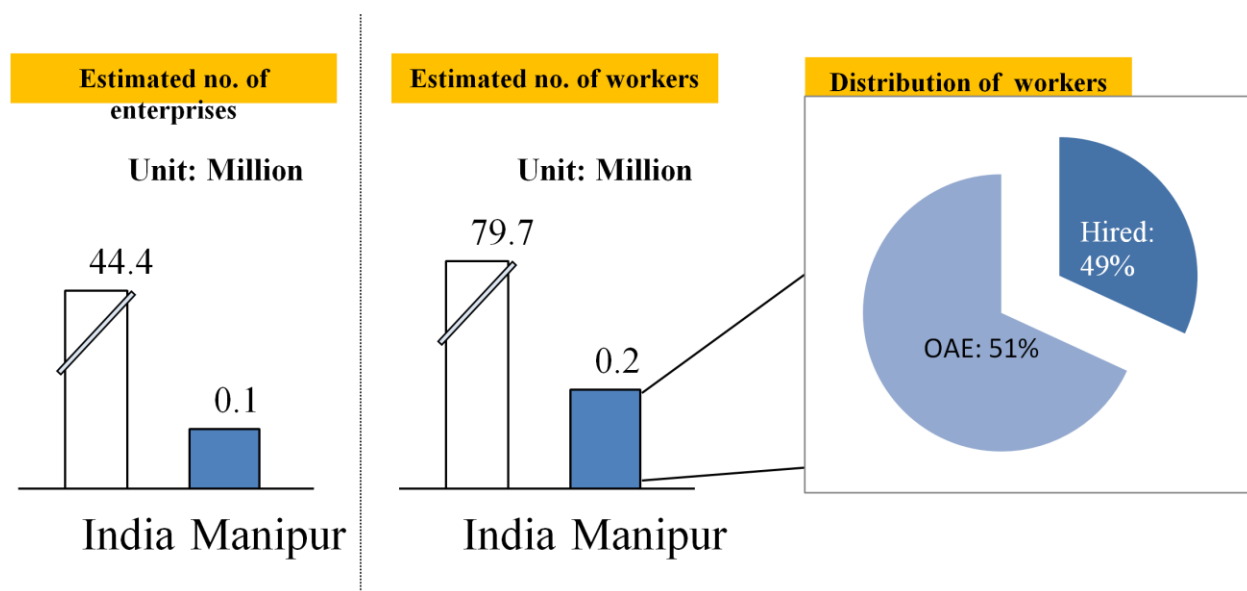
TABLE 3: DISTRICT WISE PRODUCTION AND INVESTMENT
(2005-06)

District	Production (Rs. lakh)	Investment* (Rs. lakh)
Senapati	17.41	21.48
Tamenglong	3.63	6.57
Churachandpur	12.37	4.68
Chandel	4.40	0.59
Ukhrul	1.80	0.87
Imphal East	291.63	40.15
Imphal West	101.23	81.46
Bishnupur	30.00	5.51
Thoubal	130.79	27.49
Total	593.26	154.61

SIDO-Small Industries Development Organisation; Sources: Statistical Abstract Manipur, 2009; IMaCS Analysis

As per the Fifth Economic Census, 2005, Manipur had over 96,000 enterprises, employing 221,567 persons. While 51 per cent of the employment is in Own Account Enterprises (OAE), the remaining 49 per cent is in establishments.

FIGURE 7: OAEs AND ESTABLISHMENTS IN MANIPUR



OAE: Own Account Enterprises; Source: Fifth Economic Census 2005

TABLE 4: SECTOR WISE DISTRIBUTION OF ENTERISES AND EMPLOYMENT IN MANIPUR

Major activity group	Enterprises			Employment		
	OAE	Estt.	Total	OAE	Estt.	Total
Mining & quarrying	345	38	383	506	322	828
Manufacturing	16,052	4,048	20,100	23,535	15,890	39,425
Electricity, gas & water supply	15	33	48	23	243	266
Construction	2,234	511	2,745	2,573	2,198	4,771
Sale, maint. & repair	799	907	1,706	1,242	3,343	4,585
Wholesale trade	232	114	346	322	364	686
Retail trade	39,991	5,002	44,993	54,366	13,647	68,013
Restaurants & hotels	4,787	1,394	6,181	8,439	4,691	13,130

Major activity group	Enterprises			Employment		
	OAE	Estt.	Total	OAE	Estt.	Total
Transport & storage	3,581	775	4,356	3,888	2,008	5,896
Post & telecommunication	730	191	921	935	572	1,507
Financial intermediation	65	90	155	152	1,119	1,271
Real estate, banking & service	498	234	732	756	974	1,730
Public administration, defence & social serv.	29	737	766	97	24,363	24,460
Education	735	3,676	4,411	1,122	27,815	28,937
Health & social work	190	477	667	439	4,599	5,038
Other community & personal serv.	6,029	1,900	7929	14,487	6,537	21,024
Total non-agricultural activities	76,312	20,127	96,439	112,882	108,685	221,567

OAE: Own Account Enterprises; Source: Fifth Economic Census 2005

Manufacturing and retail trade account for over 67 per cent of non-agricultural activities in Manipur and employ over 48 per cent of total non-agricultural workforce.

TABLE 5: COOPERATIVE SOCIETIES

(2008-09)

Type of society	No.	Type of society	No.
Apex	18	Housing	220
Milk supply	546	Farming	61
Marketing	20	Labour contract	309
Sugarcane	20*	Poultry	211
Weavers	1,889	Piggery farming	160
Thrift and credit	87	Other industrial	2,491
Consumer	151	Other non-credit industrial	2,057

Self-help groups (SHG) play a vital role in providing training and revenue generation avenues for the women folk, mostly, working from home in the cottage industry segment.

Non-government organisations play a vital role in providing training in other industries, particularly, related to agriculture and horticulture. They also help raise awareness such as detrimental effect of *jhum* cultivation and sensitise Government towards members' concerns. There are several NGOs in social welfare and health sectors as well.

4.3 Demography and Employment Overview

As per Census 2011, majority of Manipur's population (19 per cent) is concentrated in the Imphal West district, followed by 16.6per cent in Imphal East district. About 52 per cent of Manipur's population is concentrated in the valley, which constitutes 10 per cent of total area covered by all districts. Literacy rate has improved from 70 per cent in 2001 to about 80 per cent in 2011.

TABLE 6: DISTRICT DEMOGRAPHIC PROFILE OF MANIPUR

District	Area share	District type	Population density (per sq.km)*	Rural to Urban population	Population share*	Male to Female population*	Percentage of tribal population	Towns	Inhabited villages	Literacy rate*
Senapati\$	14.7%	Hill	109	100.0%	13.0%	1.07	43.3%	0	607	75.0%
Tamenglong	19.7%	Hill	32	100.0%	5.1%	1.05	95.4%	0	171	70.4%
Churachandpur	20.5%	Hill	59	100.0%	10.0%	1.03	93.2%	0	540	84.3%
Chandel	14.8%	Hill	43	87.4%	5.3%	1.07	91.9%	1	350	70.8%
Ukhrul	20.4%	Hill	40	100.0%	6.7%	1.06	95.5%	0	198	81.8%
Imphal East	3.2%	Valley	638	72.6%	16.6%	0.99	6.3%	6	197	82.8%
Imphal West	2.3%	Valley	992	44.5%	18.9%	0.97	4.8%	10	114	86.7%
Bishnupur	2.2%	Valley	485	64.1%	8.8%	1.00	2.9%	7	48	76.4%
Thoubal	2.3%	Valley	708	64.0%	15.5%	0.99	1.2%	9	90	76.7%

\$Does not include three subdivisions

Source: Census 2001; Statistical Abstract Manipur, 2009; *Census 2011

Over 60 per cent of Manipur's population falls in the working age range of 15-59 years. Valley districts of Bishnupur, Thoubal, Imphal West and Imphal East constitute 65 per cent of the total population in the 15-59 age group and 70 per cent over 60 years. Hill districts of Senapati, Tamenglong, Ukhurul and Chandel account for 24 per cent of population in the 15-59 age group and 21 per cent of those over 60.

TABLE 7: POPULATION BY AGE-GROUPS

District/ Age group	0-14	15-59	60+	Others*	Total	0-14	15-59	60+	Others*
Senapati#	53,475	94,407	8,417	214	156,513	34.2%	60.3%	0.1%	0.1%
Tamenglong	37,589	66,620	6,363	927	111,499	33.7%	59.7%	0.8%	0.8%
Churachandpur	75,455	137,973	14,002	475	227,905	33.1%	60.5%	0.2%	0.2%
Bishnupur	67,814	124,257	15,427	870	208,368	32.5%	59.6%	0.4%	0.4%
Thoubal	128,471	211,287	24,038	344	364,140	35.3%	58.0%	0.1%	0.1%
Imphal West	128,958	280,267	34,342	815	444,382	29.0%	63.1%	0.2%	0.2%
Imphal East	127,901	239,189	27,513	633	395,236	32.4%	60.5%	0.2%	0.2%
Ukhurul	49,314	82,321	8,960	183	140,778	35.0%	58.5%	0.1%	0.1%
Chandel	37,728	73,759	6,678	72	118,237	31.9%	62.4%	0.1%	0.1%
Manipur	706,705	1,310,080	145,740	4,533	2,167,058	32.6%	60.5%	0.2%	0.2%

Others-non-respondents

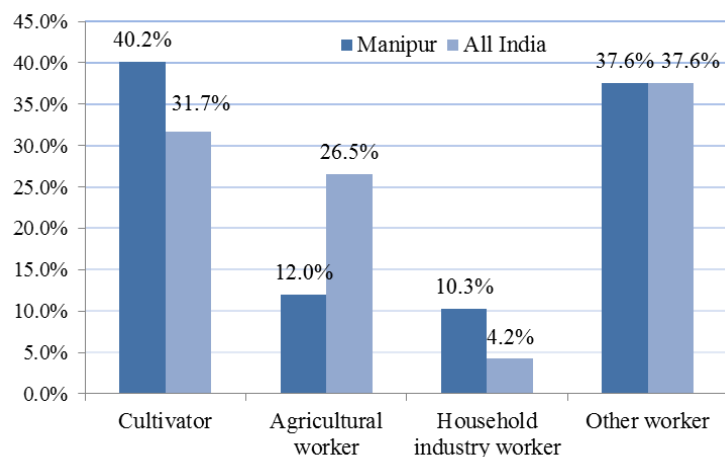
Does not include three subdivisions

Census 2001

Source: Statistical Abstract Manipur, 2009

Over 52 per cent of main and marginal workers were engaged in cultivation or agricultural labour. About 10 per cent are household industry workers.

FIGURE 8: MAIN AND MARGINAL WORKERS
(2001)



Source: Census 2001

While construction is a major contributor to secondary sector, just about 1.8 per cent of main workers are involved in this sector, indicating dependence on imported labour.

TABLE 8: DISTRIBUTION OF MAIN WORKERS BY PROFESSION
(1991)

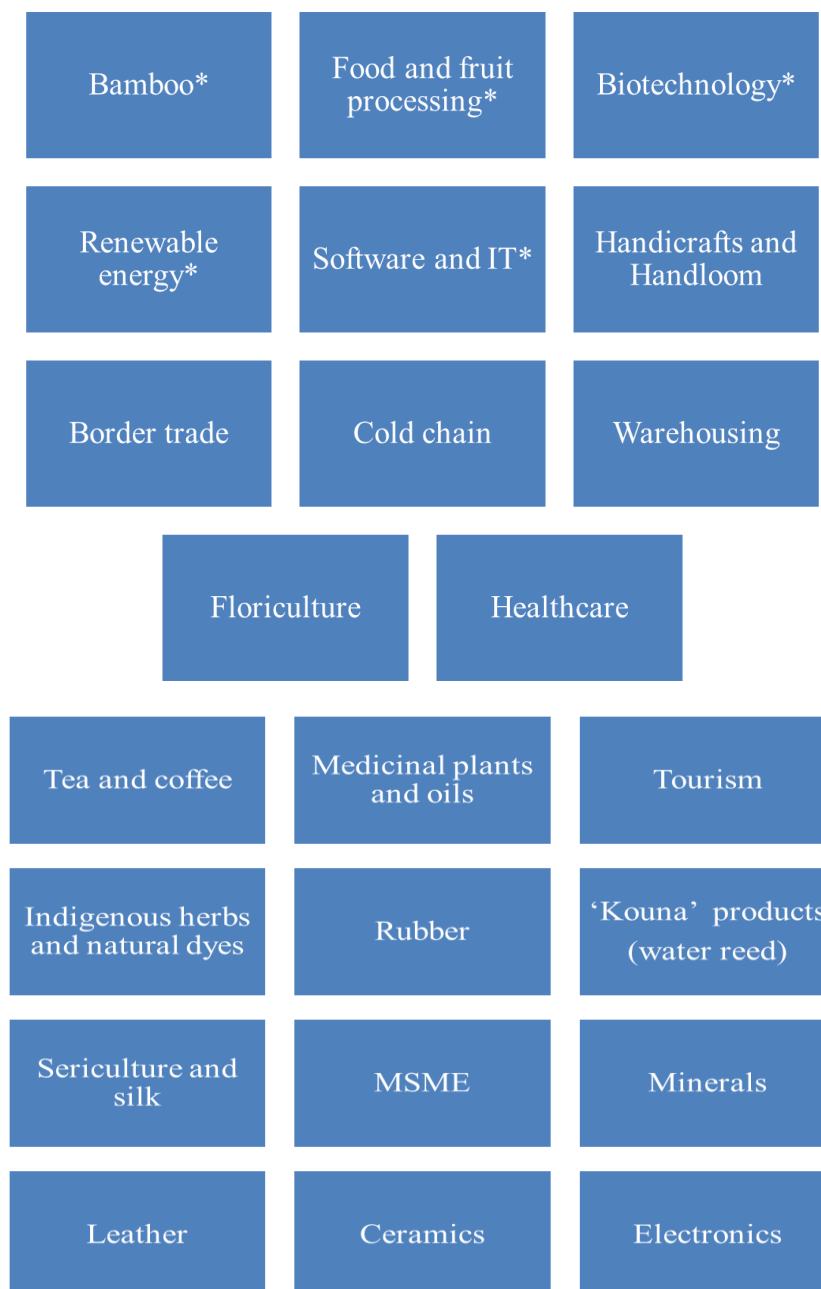
Profession	Main workers
Cultivator	72.9%
Agricultural labourer	7.9%
Animal husbandry and plantation	1.8%
Mining and quarrying	0.0%
Manufacturing, processing, servicing and repairing in household industry	6.8%
Manufacturing, processing, servicing and repairing in other industry	2.7%
Construction	1.8%
Trade and commerce	4.5%
Transport and storage	1.4%
Total	100.0%

Sources: Statistical Abstract Manipur, 2009; IMaCS Analysis

4.4 Government Policy Support

The Draft Industrial and Investment Policy of Manipur, 2011, has identified key area that need to be placed thrust upon.

FIGURE 9: THRUST AREAS IDENTIFIED UNDER DRAFT INDUSTRIAL AND INVESTMENT POLICY, 2011



Under District-wise Industrial Development Plan, industrial estates are planned in all eight districts. In addition, industrial parks, Gems and jewellery park and cold chains are also planned in various districts of the State.

TABLE 9: DISTRICT WISE INDUSTRIAL DEVELOPMENT PLAN

Type of facilities	Locations
Industrial estates	All districts
Industrial parks	Imphal West, Imphal East and Thoubal
Industrial locations (additional)	Jiribam (Imphal East), Litan (Ukhrul), Noney (Tamenglong), Nambol (Bishnupur), Churachandpur and Thoubal, Senapati
Tourism infrastructure	Tulihaal airport (Imphal), Kakching (Thoubal), Loktak Lake (Bishnupur)
Gems and jewellery park	Imphal, Kakching (Thoubal)
Cold chains, warehousing, packing, refrigeration	Several locations
Apparel park (silk focus)	Appropriate locations
Border trade	Moreh (Chandel), Jiribam (Imphal East)

Source: Draft Industrial and Investment Policy of Manipur, Department of Commerce and Industry, Government of Manipur

4.5 Infrastructure Overview

Roads are the major transport infrastructure of Manipur. The airport is small and railways are practically non-existent. Manipur has three National Highways connecting Imphal to Dimapur and border town of Moreh, Jirighat and Mizoram. Government of India has entered into a trilateral agreement with Thailand and Myanmar to construct a Trans-Asian Highway via Moreh.

The Tulihaal Airport connects the state to Tripura, Nagaland and other states via Assam. There are plans to expand the small airport to increase parking space. A new terminal building with cold storage facilities is also on the anvil. The nearest railway stations are in Assam and Nagaland. A railway line is being constructed to connect Assam with Imphal.

TABLE 10: ROAD LENGTH IN MANIPUR

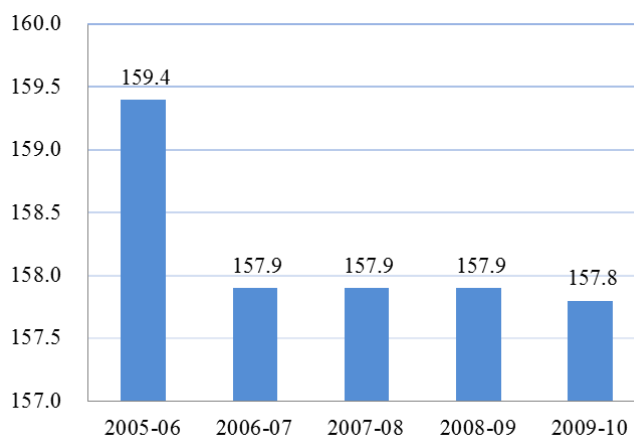
National highway	State highway	Major Dist. roads
967 km	668 km	964 km
Other Dist. roads	Inter-village roads	Total
1,013 km	5,036 km	8,648 km

Dist.- district; Source: Statistical Abstract Manipur 2009; IMaCS Research

Manipur has a central sector-owned 25.96 MW gas based plant, 45.91 MW state-owned diesel plant, 80.9 MW hydro plant (central sector) and 5.45 MW of renewable power. In 2010-11, the normal deficit in Manipur was 11.1 per cent. About 86 per cent of inhabited villages had electric connection as of 2008-09.

While mobile telephony has expanded and almost all major players have networks there, the state suffers from bandwidth constraints and terrain related network constraints.

FIGURE 10: TOTAL INSTALLED CAPACITY (MW)



Sources: Central Electricity Authority

TABLE 11: TELECOM INFRASTRUCTURE

Telecom infrastructure (2009)	
GSM cellular subscribers	5,519,150
Internet/broadband subscribers	99,432
Post offices	697
Telephone exchanges	54
Wireless subscribers	5,309,850
Wireline subscribers	326,372

Sources: Cellular Operators Association of India, Ministry of Communications & Information Technology, Telecom Regulatory Authority of India

Manipur has a total of 4,089 schools. On average, there is one school per 100 children in 6-14 years age group. In terms of higher and technical education, there are two universities, 62 general colleges, 68 professional colleges, one National Institute of Technology and seven Industrial Training Institutes (ITI).

In terms of health infrastructure, it had one doctor per 3,500 to 4,000 patients in 2008. Between 2000 and 2005, about 7,800 patients tested positive for HIV/AIDS, 78 per cent in the 21-40 age group and 8 per cent in 0-10 year group.

TABLE 12: EDUCATION INFRASTRUCTURE

Educational infrastructure
Schools: 4,089
Universities: 2
General colleges: 62
Professional colleges: 68
National Institute of Technology: 1
Industrial Training Institutes (ITI): 7

TABLE 13: HEALTH INFRASTRUCTURE

Health infrastructure*	Common causes of death
Hospitals: 13	cardiovascular, cancer, child
PHCs: 72	birth, syphilis, paralysis,
Sub-centres: 440	pre-birth, ulcers, malaria,
CHCs: 16	liver diseases, tuberculosis
Dispensaries: 20	and dysentery

*As of 2008; PHC-primary health centre; CHC-community health centre;
Sources: Census 2001; Statistical Abstract Manipur 2009; IMaCS Analysis

TABLE 14: AVAILABILITY OF WATER, SANITATION AND LIGHTING

Drinking water in households – Census 2001	
Tap: 54.74%	Hand pump: 4.29%
Tube well: 0.36%	Well: 3.68%
Others: 36.93%	
Electricity and sanitation in households – Census 2001	
Electricity: 82%	Latrine: 95.3%
Source of lighting in households – Census 2001	
Electricity: 60.04%	Kerosene: 38.03%
Solar energy: 0.23%	Other oil: 0.05%
Any other: 0.76%	No lighting: 0.90%

Crude birth rate 2009	Crude death rate 2009	Infant mortality rate
India: 22.5	India: 7.3	India: 50
Manipur: 15.4	Manipur: 4.7	Manipur: 16

Sources: Census 2001; Statistical Abstract Manipur 2009; IMaCS Analysis

Development of Manipur’s industrial infrastructure is underway. The Nilakuthi Food Park has been completed and the State Government has shortlisted investors.

TABLE 15: UPCOMING INDUSTRIAL INFRASTRUCTURE IN MANIPUR

Infrastructure	Description
Nilakuthi food park	Food park has been completed in 2011 on a land-area of about 31 acres. The Manipur Food Industries Corporation Limited is the implementing agency. The park has capacity to host 40 to 50 food processing units for which common facilities have been provided.
Integrated infrastructural development project (IID)	The Government of India has sanctioned the IID project at Moreh with a total project cost of Rs 5.75 crore (GOI-Rs. 4 crore, State-Rs 0.75 crore, SIDBI loan-Rs 1 crore). Land acquisition is under way.
Export promotion industrial park (EPIP)	The Government of India has approved the EPIP project at KhunutaChingjin in the Kakching sub-division of Thoubal district at a project cost of Rs 15 crore (GOI-Rs 10 crores, State-Rs 5 crore). Land acquisition is under way.
Trade centre	The Government of India has sanctioned Rs 1 crore each for construction of two trade centres, one at Moreh and another at Imphal. Construction of the Moreh Trade Centre is complete and that of the Imphal Trade Centre at Porompat, is ongoing.
Industrial growth centre (IGC)	Government of India has approved IGC project at Lam-lai-Napet at a cost of Rs 30 crore. Land acquisition is under way.

4.6 Key Findings from the Diagnostic Analysis

Macro-economic:

- At 5.8 per cent, Manipur's economy has grown at a lower rate than the North Eastern region (6.3 per cent) and India's 8.6 per cent, between 2004-05 and 2011. Primary, secondary and tertiary sector shares have remained almost constant with slight drop in share of secondary sector compensated by an increase in tertiary sector. Tertiary sector growth was 7.4 per cent, driven by healthcare, education, storage and communications.

- Agriculture, construction, trade and hotels, public administration and other services (healthcare and education) are key contributors to economy. State Government is significantly dependent on Central Government grants and subsidies.
- Valley districts (Imphal East and West, Bishnupur and Thoubal) contribute around 70 per cent to total district domestic product. Manipur's average per capita income is around Rs 30,500 as compared to Rs 48,300 in NE regions and Rs 62,000 in India.

Demographics and social indicators:

- The state has a large rural population. Some hill districts have 100 per cent rural population. Valley is densely populated with non-tribal population while hills are sparsely populated with predominantly tribal population.
- At about 80 per cent, overall literacy rate is higher than India average. There is a school for every 100 children in 6-14 age group. School drop-out rates are high, at 25-35 per cent. Higher education infrastructure consists predominantly of general colleges (62), seven ITIs, two universities, a National Institute of Technology, and an Institute of Plastics.
- Health indicators such as birth rate, death rate and infant mortality rate also score higher than India average.

Employment and employment generation sectors:

- The total working age labour pool is 12-13 lakh. Agriculture employs around 5 lakh, non-agricultural sector employs around 2.4 lakhs and State Government around 72,000. About 5 lakh unemployed or marginal workers. Between 2011 and 2021, 12.5-13 lakh persons are expected to reach working age population.
- Non-agriculture sector is dominated by: a) small scale sector manufacturing, 95 per cent of which is unregistered or informal (Rs 330 crores) b) retail trade.
- Handloom and handicraft form a large part of Manipur's informal sector.

Government Policy:

- The State Industrial Policy, released in 2000 had a few areas as thrust sectors. Out of those, some of the areas like bamboo, handloom, handicraft, plantation fibre, and KVI have seen some growth since then. These are sectors which have grown due to availability of natural resources and traditional skills of the people.

- Other sectors like electronics and IT, food and fruit processing, mines and minerals have seen minimal growth due to lack of adequate infrastructure, lack of investment (both from within and from outside the state) and lack of market linkage.
- Tea, rubber and coffee have been started on an experimental basis.

Factor advantages and current disadvantages:

- The State's advantages include: soil and climate suitable for horticulture, tourism (fruit festivals, wild life, lake, tribal), educated labour force, equal participation of men and women in work force, air travel connectivity, active international border with Myanmar (Moreh-Tamu).
- Disadvantages include: security concerns, low entrepreneurial activity, traditional sector dependence poor state of physical infrastructure (power, cold chains, road, rail) and slow pace of development, poor creditworthiness making loans almost impossible to get, dependence on Government jobs and lack of vocational training centres.
- Jobs demand exceeds supply; theme to sustain in future. Skilling for employability outside state imperative.

State Government Policy:

- The Government has spelt out several sectors in the draft policy document. Implementation plan necessary for focus sectors.
- Skill development plan includes training programmes for youth within and outside the State.
- Met with success in terms of training outside state in hospitality and beauty courses, with good placement record.

4.7 SWOT Analysis of Manipur



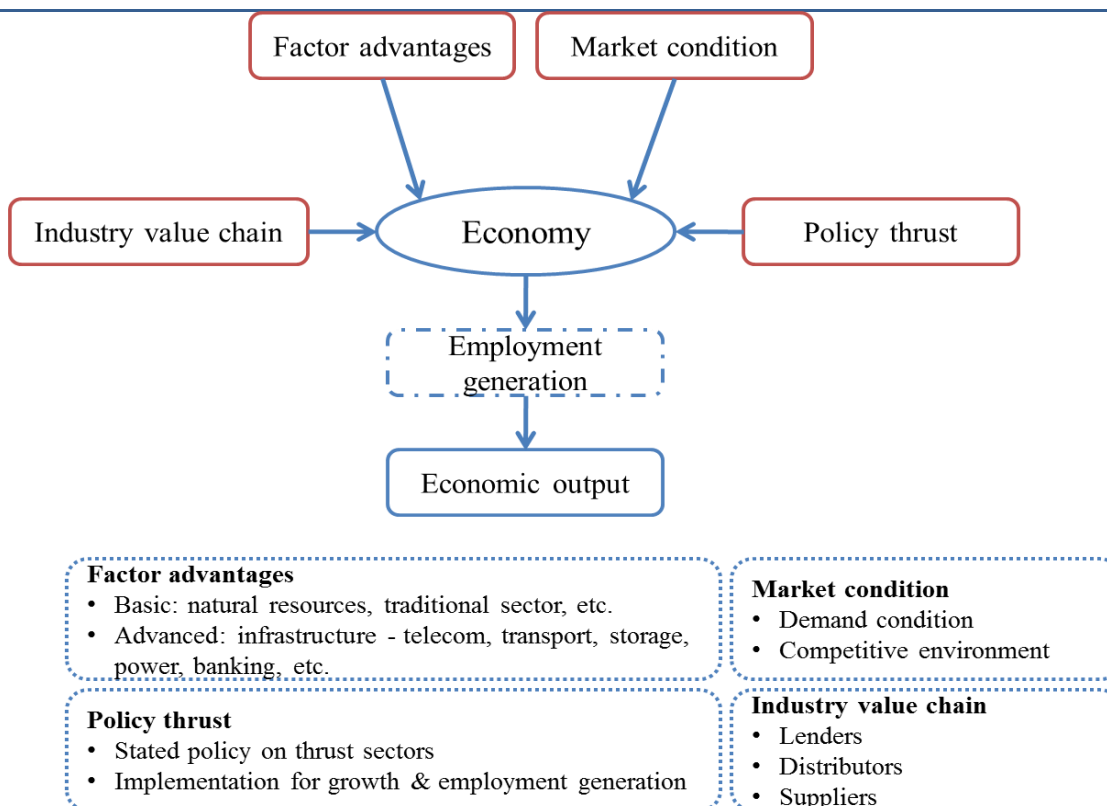
PART – II (b): Identification of growth sectors

5.1 Criteria for selecting growth sectors

Given below are the criteria we have adopted for selecting sectors with potential for employment generation:

- Resident skills that will continue to be a source of employment generation in next 10 years – skill development required for enhancing competitiveness.
- Sectors with policy support from Central and State Government for expansion, training and marketing.
- Product is unique to the region or occurs abundantly because of factor advantages, but has just started to be exploited as an economic activity.
- Infrastructure investment required to support industrial and economic growth; investment which has started or is planned.
- Common service trades such as electricians, plumbers and repair mechanics – those which require service quality enhancement.

5.2 Framework for identifying growth engines



The framework mentioned above has been used to identify potential sectors where economic activities will create employment between 2011 and 2021. The growth engines for a state's economy are driven by the factor advantages within the state, market conditions, industry value chain available and Government policy support. These factors lead to growth in economic output which in turn determines the annual incremental employment opportunities within the state.

5.3 Identified sectors for livelihood and local demand sectors

Based on the framework mentioned above, sectors have been identified for skilling and upgrading skills. These sectors are expected to provide employment opportunities in the coming 10 years. Sectors for domestic demand have been identified based on factor endowments, policy thrust, market potential, historical presence, availability of trained manpower, availability and quality of training centre, time taken to train and employment opportunities.

TABLE 16: SHORTLISTED SECTORS

Sector	Market Linkage	Historical Presence	Infrastructure Adequacy	Availability and quality of training centre	Time taken to train*	Employment opportunities**
Handloom & handicraft	×	√	√	×	Medium	High
Food Processing	×	×	√	×	Low	Medium
Apiculture	×	√	√	×	Low	Low
Hotels	√	×	×	×	Medium	Medium
IT/ITES	×	×	×	×	High	High
Horticulture	×	√	√	×	High	High
Construction	-	√	×	×	Low to Medium	High
Border Trade	-	√	×	×	Medium	High
Forest-based industry	×	√	-	×	Low	Medium
Other services: Motor Repair, Nursing, Beauty Culture etc.	-	×	×	×	Low	Low to Medium

*Low : Up to one year; Medium : One to two years; High: More than two years.

** Low: Employment potential of 0 to 500 persons; Medium: 500 to 1,000 persons; High: More than 1,000 persons.

Source: IMA CS Analysis

5.4 Identified sectors for migration

Sectors for migration have been identified based on natural aptitude, youth aspiration, market potential, availability of trained manpower, availability and quality of training centre and time taken to train.

TABLE 17: SHORTLISTED SECTORS

Sector	Basic factor advantages	Potential for jobs after skilling	Advanced factor advantages required	Industry value chain required
Handloom & Handicraft	Traditional sector with well developed skills and large employment base	Within Manipur	Transport, telecom, IT	Lenders, distributors, suppliers
Food Processing	Growing horticulture sector	Within Manipur	Cold chain, power, transport, telecom	Lenders
Apiculture	Forest resource, flowers	Within Manipur	Transport, packaging, telecom	Distributors
Hotels	Tourism potential	Within & outside Manipur	Transport, IT, telecom	Lenders, suppliers
IT/ITES	Educational institutions	Outside Manipur	IT, telecom, power	Lenders
Horticulture	Soil & climate	Within Manipur	Transport, IT, telecom	Lenders, distributors, suppliers
Construction	Infrastructure projects	Within Manipur	-	-
Border Trade	International border – Moreh	Within & outside Manipur	Transport, telecom, IT	-
Forest-based Industry	Forest resource	Within Manipur	Transport, telecom, packaging, power	Distributors
Other services: Motor Repair, Nursing, Beauty culture, etc.	Preference for services, educational institutions	Within & outside Manipur	-	Suppliers

Source: IMACSSurvey and Analysis

5.5 Type of skilling required in identified sectors

Skilling requirements have been classified into speciality skills, new skills and skill up-gradation for each of the sectors identified.

TABLE 18: SKILLING REQUIRED

Sectors	Specialty skills	New skills	Skill up-gradation
Handloom		✓	✓
Handicrafts		✓	✓
Horticulture		✓	✓
Apiculture		✓	✓
Food processing	✓		
Tourism and hospitality		✓	
Traditional restaurants			✓
IT/ITES	✓		✓
Healthcare			✓
Construction	✓		
Beauty Culture	✓	✓	
Border trade		✓	
Motor repair		✓	✓
Forest based products	✓	✓	

Specialty skills: technical or specific knowledge base essential

New skills: training centres largely non-existent

Skill-up-gradation: out-dated techniques and knowledge base

5.6 Type of skilling required in sectors identified for migration

For migration related skills as well, skilling requirements have been classified into speciality skills, new skills and skill up-gradation for the identified sectors.

TABLE 19: TYPE OF SKILLING REQUIRED FOR MIGRATION

Sectors	Specialty skills	New skills	Skill up-gradation
Sectors for migration			
Beauty	✓	✓	✓
Hospitality and wellness		✓	✓
IT / ITES		✓	✓
Retail Services		✓	✓
Fashion Designing	✓	✓	✓
Flight attendants		✓	✓
Ground staff at the airports		✓	✓
Healthcare	✓	✓	✓
Language Skills		✓	✓

Specialty skills: technical or specific knowledge base essential

New skills: training centres largely non-existent

Skill-up-gradation: outdated techniques and knowledge base

Source: IMaCS Analysis

PART – II (c): District level Analysis of Manipur

6.1. Bishnupur

Bishnupur district is the smallest district in Manipur in terms of its area share at 2.2 per cent of the total. It is a valley district with a population density of 420 persons per sq. km. It has derived its name from a Vishnu Temple located at Lamangdong. The district is also known as the “land of dancing deers”. It is home to the Keibullamjao National Park, Loktak Lake and Loukoipat Ecological Park.

6.1.1 Economy

As of 2005-06, Bishnupur had a District Domestic Product of Rs 48,855 lakh. Its per capita income was second highest in the State amongst all districts, at Rs 21,928.

6.1.2 Demography

Bishnupur’s share in Manipur’s land area is 2.2 per cent. However, its share in State’s population is high at 8.8 per cent. The district has the highest population of 485 persons per sq. km. The population is mostly rural at 64.1 per cent. Literacy rate is 76.4 per cent.

6.1.3 Infrastructure

Infrastructure is under-developed and needs to be ramped up. Drinking water facilities are available in all 48 inhabited villages in the district. Electricity supply is, however, available in 46 villages.

TABLE 20: INFRASTRUCTURE FACILITIES IN BISHNUPUR

Facilities	Number of villages
Drinking water facilities	48
Safe drinking water	41
Electricity - supply	46
Electricity - domestic	46
Electricity - agriculture	-

Source: Census 2001, IMA CS Analysis

Education Infrastructure:

As of 2001 Census, primary schools are available in 47 of 48 inhabited villages in the district. Middle schools are available in 38, secondary schools in 23 and colleges in none of the districts.

TABLE 21: EDUCATION INFRASTRUCTURE IN BISHNUPUR

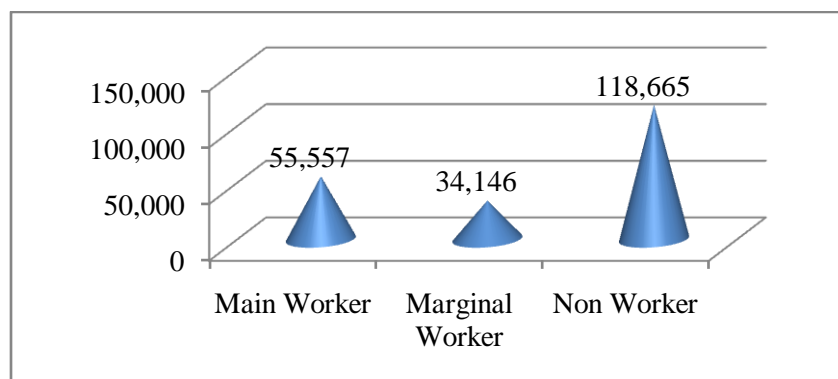
Institute	No. of villages
Primary school	47
Middle schools	38
Secondary/Sr Secondary schools	23
College	Nil

Source: Census 2001, IMaCS Analysis

6.1.4 Employment Pattern

Bishnupur has a total of 89,703 workers, with working population to total population at 43 per cent. About 62 per cent of the workers are main workers, while the remaining are marginal workers.

FIGURE 11: EMPLOYMENT PATTERN IN BISHNUPUR DISTRICT



Source: Census 2001, IMaCS Analysis

6.1.5 Potential sectors in district

Based on the factor advantages, following sectors have been identified in the district for skilling and upgrading skills:

Healthcare professionals:

- Bishnupur has several private nursing institutes. There is demand for nursing and paramedical training.

- The Directorate of Health Services, Manipur, has plans to set up seven nursing institutes in the districts, one in Bishnupur. They are to be funded by the Ministry of Health, Government of India. The plan has got delayed from the original Eleventh Plan target.

Fisheries:

- Almost all agricultural households have fish ponds; In Bishnupur district alone, there are around 5,000 households in the Loktak Lake area who depend on fisheries for livelihood.
- Demand exceeds supply; Fish imported from Kolkata; Grass and other carp, katla, rahoo, mirgan, pengba, cat fish, ngapai, etc., are best suited for pisciculture in the state.
- Outdated fish farming techniques, low investment, lack of funds, natural disasters like flood and diseases are major impediments; There is no processing unit for fish in the state at present.

Handicraft:

- Bishnupur district is well known for its embroidery work along with handloom weaving.
- There is one artisan cluster in Bishnupur.

Forest based product:

- Bishnupur has a well-developed carpentry industry.
- Wood is procured from hill district of Tamenglong.
- Furniture from wood is sold mainly locally, on order from the city folks and army.

Tourism circuit:

- The Loktak Lake and Adjoining Wild Life Sanctuary provide a tourism circuit along with other places in the state.
- Being close to Imphal, the tourism circuit can be developed for day trips.

6.2 Chandel

The Chandel district (formerly known as Tengnoupal district) came into existence on May 13, 1974. It is the border district of the State. Its neighbours are Myanmar on the south, Ukhruel district on the east, Churachandpur district on the south and west, and Thoubal district on the north. It is about 64 km. away from Imphal. The National Highway No. 39 passes through this district.

6.2.1 Economy

As of 2005-06, as compared to other districts, Chandel made the lowest contribution to Manipur's GSDP at Rs 22,277 lakh. The district's per capita income during the same period was third lowest at Rs 16,261.

6.2.2 Demography

Chandel's share in Manipur's land area is 14.8 per cent and its share in State's population is low at 5.3 per cent. Population density in the district is third lowest as compared to other districts at just 43. Majority of the population is rural, at 87.4 per cent. Population is mostly tribal in nature at 91.9 per cent. Literacy rate is at 70.8 per cent.

6.2.3 Infrastructure

Drinking water facilities are available in 323 out of 350 inhabited villages in the district. Electricity supply is, however, available in 190 villages.

TABLE 22: INFRASTRUCTURE FACILITIES IN CHANDEL

Facilities	Number of villages
Drinking water facilities	323
Safe drinking water	125
Electricity - supply	190
Electricity - domestic	190
Electricity - agriculture	-

Source: Census 2001, IMAcS Analysis

Education Infrastructure:

As of 2001 Census, primary schools are available in 214 of 350 inhabited villages in the district. Middle schools are available in 50, secondary schools in 16 and colleges in two villages.

TABLE 23: EDUCATION INFRASTRUCTURE IN CHANDEL

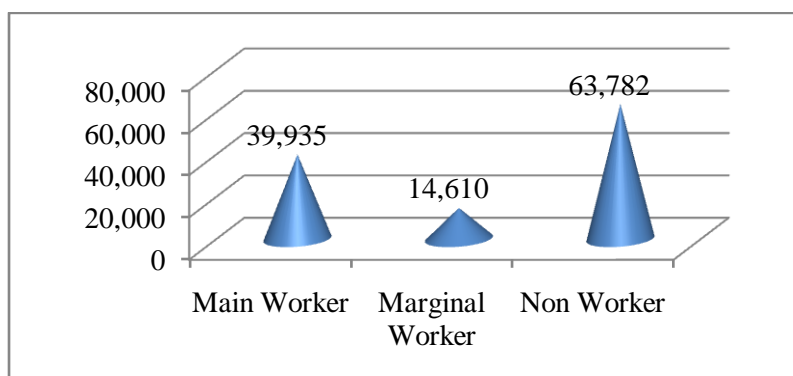
Institute	No. of villages
Primary school	214
Middle schools	50
Secondary/Sr Secondary schools	16
College	2

Source: Census 2001, IMaCS Analysis

6.2.4 Employment Pattern

Chandel district has a total of 54,545 workers, bringing the working population ratio as a percentage of total population at 46 per cent. About 73 per cent of the workers are main workers, while the remaining are marginal workers.

FIGURE 12: EMPLOYMENT PATTERN IN CHANDEL DISTRICT



Source: Census 2001, IMaCS Analysis

6.2.5 Potential sectors in district

Based on the factor advantages, following sectors have been identified in the district for skilling and upgrading skills:

Border trade:

- Manipur shares 398 km of international border with Myanmar. The Moreh-Tamu border in Chandel district is most suited for cross-border trade.
- It is also the most active border trade centre among the 13 locations identified by the Government of India for integrated check posts.

- Trade has increased from Rs. 95.48 million in 2001-02 to Rs. 298.19 million in 2009-2010.
- Land customs station exists and integrated check post is being developed.
- Development of border trade has the potential to change the district's economy by generating employment in support sectors such as boarding and lodging, transportation and logistics.

6.3 Churachandpur

Churachandpur district is the largest district in Manipur in terms of its area share at 20.5 per cent. In 2006, the Ministry of Panchayati Raj named Churachandpur as one of the 250 most backward districts of India. It is currently receiving funds from the Backward Regions Grant Fund Programme.

6.3.1 Economy

As of 2005-06, the district had a District Domestic Product at Rs 39,641 lakh. Its per capita income was second lowest as compared to other districts at Rs 15,509.

6.3.2 Demography

Churachandpur's share in Manipur's land area is 20.5 per cent and its share in State's population is at 10 per cent. Population density in the district is low at just 59. It is 100 per cent rural. Percentage of tribal population to total population is high at 93.2 per cent. Literacy rate is 84.3 per cent.

6.3.3 Infrastructure

Infrastructure in the district needs more development. Drinking water facilities are available in 539 out of 540 inhabited villages in the district. Electricity supply is, however, available in 306 villages.

TABLE 24: INFRASTRUCTURE FACILITIES IN CHURACHANDPUR

Facilities	Number of villages
Drinking water facilities	539
Safe drinking water	161
Electricity - supply	306
Electricity - domestic	306
Electricity - agriculture	-

Source: Census 2001, IMA CS Analysis

Education Infrastructure:

As of 2001 Census, primary schools are available in 295 out of 540 inhabited villages in the district. Middle schools are available in 143, secondary schools in 48 and colleges in five villages.

TABLE 25: EDUCATION INFRASTRUCTURE IN CHURACHANDPUR

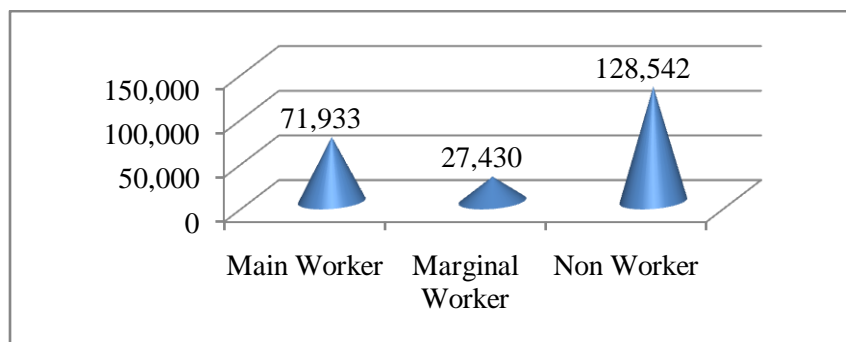
Institutes	No. of villages
Primary school	395
Middle schools	143
Secondary/Sr Secondary schools	48
College	5

Source: Census 2001, IMaCS Analysis

6.3.4 Employment Pattern

Churachandpur district has a total of 99,363 workers, bringing the working population ratio as a percentage of total population at 44 per cent. About 72 per cent of the workers are main workers, while the remaining are marginal workers.

FIGURE 13: EMPLOYMENT PATTERN IN CHURACHANDPURDISTRICT



Source: Census 2001, IMaCS Analysis

6.3.5 Potential sectors in district

Based on the factor advantages, following sectors have been identified in the district for skilling and upgrading skills:

Handloom and Forest based products:

- Churachandpur district is surrounded by forest, which provides local crafts persons with opportunities to make products from dry flowers and wood.
- The district is also well known for cane and bamboo products.
- Apiculture is a livelihood opportunity in the district.
- Tribal handloom is a traditional product, which the State Government is supporting by organising them under self-help groups are imparting training and tools.

Horticulture:

- The district is known for its pineapples. Annual pineapple festival is held in the district.
- There is potential for development of cold storage and refrigerated transportation of pineapples for processing in the State.

Healthcare and training:

- There is demand for nursing and paramedical training.
- The Directorate of Health Services, Manipur, has plans to set up seven nursing institutes in the districts, one in Churachandpur. They are to be funded by the Ministry of Health, Government of India. The plan has got delayed from the original Eleventh Plan target.

Tourism circuit:

- The Khuga dam near Mata village is a beautiful artificial lake of North Eastern India. This along with the Ngaloi falls and Loktak lake in Bishnupur can form a tourism circuit.
- Being close to Imphal, it can be created a day trip centre with a combination of tribal culture, handicrafts village and eco-tourism.

6.4 Imphal (West and East)

Imphal West and East districts were earlier one district. They were split into two districts in 1997. Together, the two districts contribute to the maximum share of Manipur's population at 36.6 per cent. Imphal city is the capital of Manipur and the main commercial hub for all economic activity.

6.4.1 Economy

As of 2005-06, while Imphal West had the highest District Domestic Product (DDP) at Rs 157,071 lakh, as compared to other districts, Imphal East had the second highest DDP at Rs 72,114 lakh. Imphal West and Imphal East's per capita income was Rs 33,109 and Rs 17,044 respectively.

6.4.2 Demography

Imphal West and East's share in Manipur's land area is 5.5 per cent only. However, their share in State's population is at 35.5 per cent. Share of rural population to total population in Imphal West and East was 44.5 per cent and 72.6 per cent respectively. Literacy rate in Imphal West and East is 86.7 per cent and 82.8 per cent respectively.

6.4.3 Infrastructure

Infrastructure in the district needs more development. In Imphal East, drinking water facilities are available in 196 out of 197 inhabited villages in the district. Electricity supply was, however, available in only 191 villages. In Imphal West, drinking water facilities are available in all 114 inhabited villages. Electricity supply was also available in all 114 villages.

TABLE 26: INFRASTRUCTURE FACILITIES IN IMPHAL EAST

Facilities	Number of villages
Drinking water facilities	196
Safe drinking water	170
Electricity - supply	191
Electricity - domestic	191
Electricity - agriculture	Nil

Source: Census 2001, IMaCS Analysis

TABLE 27: INFRASTRUCTURE FACILITIES IN IMPHAL WEST

Facilities	Number of villages
Drinking water facilities	114
Safe drinking water	104
Electricity - supply	114
Electricity - domestic	114
Electricity - agriculture	Nil

Source: Census 2001, IMaCS Analysis

Education Infrastructure:

As of 2001 Census, in Imphal East, primary schools are available in 189 out of 197 inhabited villages in the district. Middle schools are available in 100, secondary schools in 50 and colleges in six villages. In Imphal West district, primary schools are available in 112 out of 114 inhabited villages in the district. Middle schools are available in 74, secondary schools in 53 and colleges in five villages.

TABLE 28: EDUCATION INFRASTRUCTURE IN IMPHAL EAST

Institute	No. of villages
Primary school	189
Middle schools	100
Secondary/Sr Secondary schools	50
College	6

Source: Census 2001, IMaCS Analysis

TABLE 29: EDUCATION INFRASTRUCTURE IN IMPHAL WEST

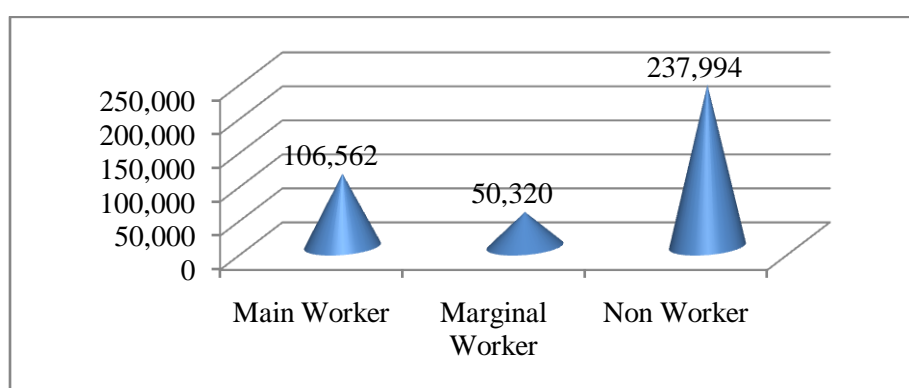
Institute	No. of villages
Primary school	112
Middle schools	74
Secondary/Sr Secondary schools	53
College	5

Source: Census 2001, IMaCS Analysis

6.4.4 Employment Pattern

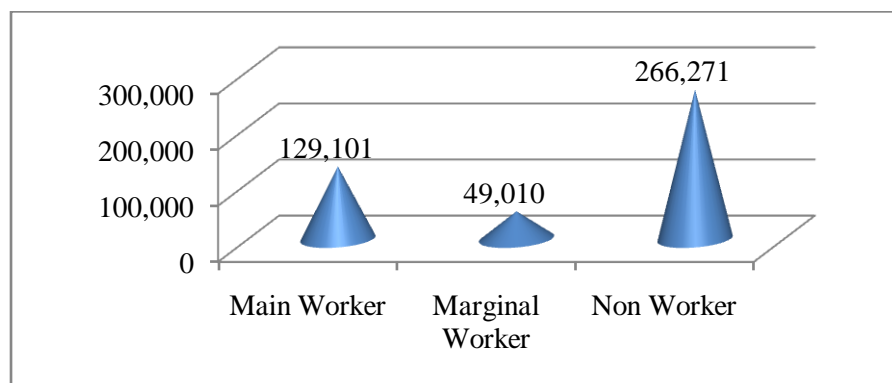
Imphal East has a total of 156,882 workers, bringing the working population ratio as a percentage of total population at 40 per cent. About 68 per cent of the workers are main workers, while the remaining are marginal workers. Imphal West has a total of 178,111 workers, bringing the working population ratio as a percentage of total population at 40 per cent. About 72 per cent of the workers are main workers, while the remaining are marginal workers.

FIGURE 14: EMPLOYMENT PATTERN IN IMPHALEAST DISTRICT



Source: Census 2001, IMaCS Analysis

FIGURE 15: EMPLOYMENT PATTERN IN IMPHAL WEST DISTRICT



6.4.5 Potential sectors in district

Based on the factor advantages, following sectors have been identified in the district for skilling and upgrading skills:

Hotels:

- Being the capital city, well connected by road and air, and located at the heart of a small State, it is ideal for locating hotels with tourism circuits nearby.
- However, as of now, there is only one 3-Star category hotel, located in Imphal. It is extremely popular and three-four years old.
- Insurgency news is a big deterrent to tourism.
- Lifting off permit norm for foreigners may help increase foreign tourist inflow in coming years.
- Some foreign arrivals started from Japan, Thailand, Europe, mainly for business trips.
- Easing of land norms may also help.
- Very few eateries or restaurants for middle-class in Imphal.

IT, Call Centre:

- There are seven to eight active IT entrepreneurs, employing up to 75 persons.
- They are mostly dependent on State Government or Central Government projects.
- STPI infrastructure is helpful, but inadequate because of poor bandwidth.
- Better trained persons seek jobs outside the State. Locally hired persons need retraining.

Sports trainers:

- Manipur has produced many national and international award winning athletes (wrestling, boxing); Football, Martial arts and Polo also popular.

Handloom and handicrafts:

- Imphal had four major handloom clusters which include weaving, embroidery, mats, hand block printing, appliqué work and carpets.
- Woven silk products command a premium. They are sold outside State in Delhi, Bangalore and other places.
- Arts and crafts *melas* are also key selling markets.

Food processing:

- The Nilakuthi food park offer opportunity for development of food processing.
- Takyel and other local food processing units also have enough business to supply to local market.
- While they would like to expand beyond local market, skills are required to scale up.

Construction:

- Roads and railway projects are the main drivers of construction activity.
- A long awaited hydro-electric project may generate opportunities for employment, when it comes up for construction.

Auto mechanics:

- Repairing done for two and four wheelers, and heavy vehicles. For heavy vehicles – two types of units, i.e., body making and engine repairing are mostly located in Imphal. However, power shortage, a major constraint.
- There are around more than 300 units in Imphal with around 5-10 persons in each unit. Mechanics (non-authorized dealer) are trained on the job and have no formal training
- Large and medium size vehicles are sent to Guwahati or Dimapur.

6.5 Senapati

Senapati District is located in the northern part of Manipur. It is bounded on the east by Ukhrul District, on the west by Tamenglong District, on the north by Phek District of Nagaland and on the south by Imphal East District and Imphal West District. The District is at an altitude varying from 1061 m to 1788 m above sea level. Literacy rate in the district is very low at just 28.4 per cent.

6.5.1 Economy

As of 2005-06, the DDP of Senapati was Rs 48,567 lakh. It had the lowest per capita income as compared to other districts at Rs 14,798.

6.5.2 Demography

Senapati's share in Manipur's land area is 14.7 per cent. However, its share in State's population is at 13 per cent. Population density in the district is 109 persons per sq. km. It is 100 per cent rural. Literacy rate is at 75 per cent.

6.5.3 Infrastructure

Infrastructure in the district needs more development. Drinking water facilities are available in 487 out of 491 inhabited villages in the district. Electricity supply is, however, available in 432 villages.

TABLE 30: INFRASTRUCTURE FACILITIES IN SENAPATI

Facilities	Number of villages
Drinking water facilities	487
Safe Drinking water	182
Electricity (Power Supply)	432
Electricity (domestic)	432
Electricity (Agriculture)	Nil

Source: Census 2001, IMaCS Analysis

Excluding three sub-divisions.

Education Infrastructure:

As of 2001 Census, primary schools were available in 283 out of 491 inhabited villages in the district. Middle schools were available in 73, secondary schools in 18 and colleges in two villages.

TABLE 31: EDUCATION INFRASTRUCTURE IN SENAPATI

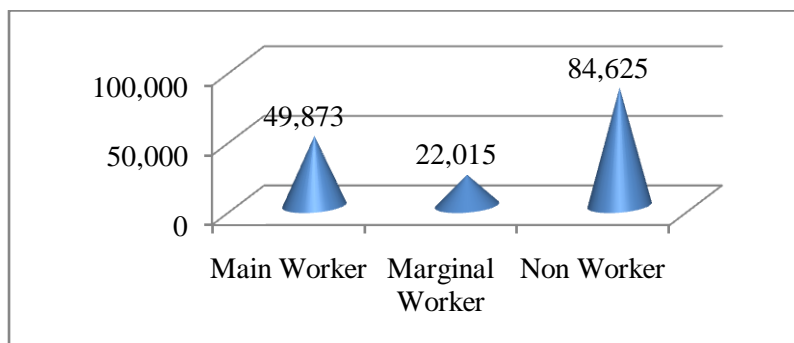
Institute	No. of villages
Primary school	283
Middle schools	73
Secondary/Sr Secondary schools	18
College	2

Source: Census 2001, IMaCS Analysis

6.5.4 Employment Pattern

Senapati has a total of 71,888 workers, bringing the working population ratio as a percentage of total population at 46 per cent. About 69 per cent of the workers are main workers, while the remaining are marginal workers.

FIGURE 16: EMPLOYMENT PATTERN IN SENAPATI DISTRICT



Source: Census 2001, IMaCS Analysis

6.5.5 Potential sectors in district

Based on the factor advantages, following sectors have been identified in the district for skilling and upgrading skills:

Horticulture and Forest based activities:

- Senapati district has 80 per cent forest. It could provide employment opportunities for tribal tourism, dry flowers and wood products.
- Apiculture is a livelihood activity in the district.
- There is potential for growing orchids on the lower reaches of the hills in the district.

Construction:

- Construction and upgrading the road infrastructure is a key activity planned for Senapati district.
- There is several construction works under the MNREGA.

6.6 Tamenglong

Tamenglong is the least populous district in Manipur, with a total population share of 4.9 per cent. On the other hand, its share in State's area is high at 19.7 per cent. Thus, the population density is also lowest at 25 persons per sq. km. This district is bounded by Nagaland state on the north, by Senapati district on the north and east, by Churchandpur district on the south and by Imphal West district and Assam state on the west. In 2006, the Ministry of Panchayati Raj named Tamenglong one of the country's 250 most backward districts

6.6.1 Economy

As of 2005-06, the district had the second lowest DDP amongst all districts at Rs24,205 lakh. Its per capita income was, however, third highest at Rs19,743.

6.6.2 Demography

Tamenglong's share in Manipur's land area is 19.7 per cent. However, its share in State's population is only at 5.1 per cent. Thus, the population density in the district is low at just 32 persons per sq. km. This is the lowest population density in Manipur. Rural population as a percentage of total population is at 100 per cent. Most of the population is tribal at 95.4 per cent of the total population. Literacy rate is 70.4 per cent.

6.6.3 Infrastructure

Infrastructure in the district needs more development. Drinking water facilities are available in all 171 inhabited villages in the district. Electricity supply is, however, available in 75 villages.

TABLE 32: INFRASTRUCTURE FACILITIES IN TAMENGLONG

Facilities	Number of villages
Drinking water facilities	171
Safe Drinking water	75
Electricity (Power Supply)	75
Electricity (domestic)	75
Electricity (Agriculture)	Nil

Source: Census 2001, IMaCS Analysis

Education Infrastructure:

As of 2001 Census, primary schools were available in 157 out of 171 inhabited villages in the district. Middle schools were available in 68, secondary schools in 15 and colleges in one village.

TABLE 33: EDUCATION INFRASTRUCTURE IN TAMENGLONG

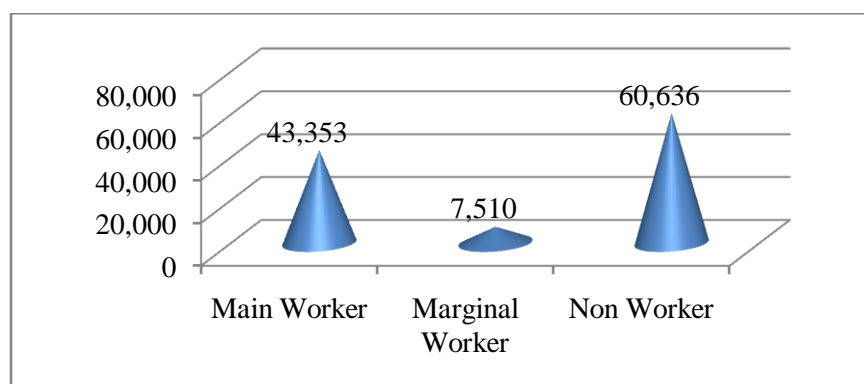
Institute	No. of villages
Primary school	157
Middle schools	68
Secondary/Sr Secondary schools	15
College	1

Source: Census 2001, IMaCS Analysis

6.6.4 Employment Pattern

Tamenglong has a total of 50,863 workers, with a working population of 46 percent of total population at 46 per cent. About 85per cent of the workers are main workers, while the remaining are marginal workers.

FIGURE 17: EMPLOYMENT PATTERN IN TAMENGLONG DISTRICT



Source: Census 2001, IMaCS Analysis

6.6.5 Potential sectors in district

Based on the factor advantages, following sectors have been identified in the district for skilling and upgrading skills:

Horticulture and floriculture:

- Tamenglong is well known for oranges.
- The district organizes annual orange festival.
- Orchids are found abundantly in this district. They offer potential for growth through tissue culture based plantation.

Construction:

- The Public Works Department has several roads and bridges projects for the district.
- The road linking Tamenglong to other districts is also being upgraded.

Forest based product:

- Abundance of forests give rise to opportunities for developing forest based products sectors such as dry flowers and wood craft.

6.7 Thoubal

Thoubal is a valley district. It is the second most populous district of Manipur in terms of its population density at 708 persons per sq. km. (after Imphal West district). Its share in Manipur's land area is 2.3 per cent, however, share in population is high at 15.9 per cent.

6.7.1 Economy

As of 2005-06, the district had the third highest DDP in Manipur at Rs70,052 lakh. Its per capita income was Rs17,575.

6.7.2 Demography

Thoubal has the lowest share in Manipur's land area at 2.3 per cent. Its share in State's population is, however, high at 15.5 per cent. The population density in the district is 708 persons per sq.km. The

district is mostly rural, with rural population at 64 per cent of the total population. Literacy rate is 76.7 per cent.

6.7.3 Infrastructure

The district has a fairly developed system of road transport. All towns and important villages in the district are connected either by the National or State or district or village roads. The National Highway No. 39- Indo-Burma Road, passes through the heart of the district. Drinking water facilities are available in all 90 inhabited villages in the district. Electricity supply is available in 84 villages.

TABLE 34: INFRASTRUCTURE FACILITIES IN THOUBAL

Facilities	Number of villages
Drinking water facilities	90
Safe Drinking water	88
Electricity (Power Supply)	84
Electricity (domestic)	84
Electricity (Agriculture)	Nil

Source: Census 2001, IMaCS Analysis

Education Infrastructure:

As of 2001 Census, primary schools were available in 88 out of 91 inhabited villages in the district. Middle schools were available in 58, secondary schools in 35 and colleges in one village.

TABLE 35: EDUCATION INFRASTRUCTURE IN THOUBAL

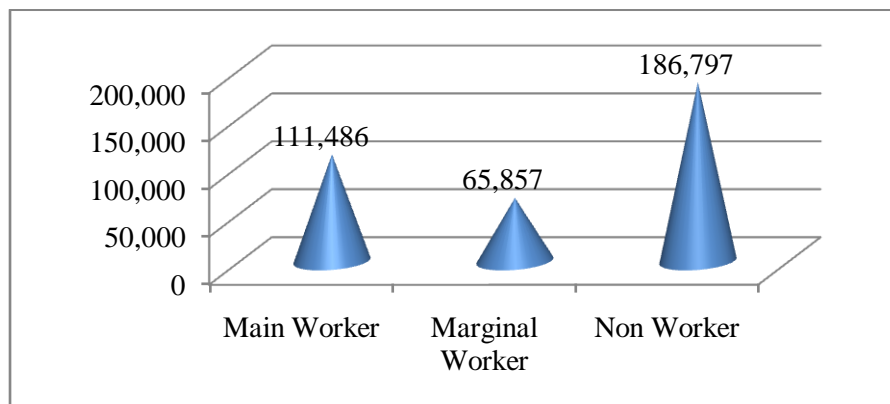
Institute	No. of villages
Primary school	88
Middle schools	58
Secondary/Sr Secondary schools	35
College	1

Source: Census 2001, IMaCS Analysis

6.7.4 Employment Pattern

Thoubal district has a total of 177,343 workers, bringing the working population ratio as a percentage of total population at 49 per cent. About 63 per cent of the workers are main workers, while the remaining are marginal workers.

FIGURE 18: EMPLOYMENT PATTERN IN THOUBAL DISTRICT



Source: Census 2001, IMaCS Analysis

6.7.5 Potential sectors in district

Based on the factor advantages, following sectors have been identified in the district for skilling and upgrading skills:

Horticulture:

- Among the plantation crops, pineapples are the most important and are cultivated in the slopes of low hills and hillocks.
- Although tea plantation is yet to take its shape in the district, a blend of local variety is grown in Pallel and Waikhong area.
- Another important plantation crop is chillies.
- Bamboos and plantain trees are common everywhere.
- The soil and climatic conditions in the district support various types of fruit-bearing plants in the districts. Important varieties are pineapple, pear, peach, jack fruit, banana, mango, lemon, plum, guava, amla, etc.

Handloom and Handicraft:

- There are four handloom and handicrafts clusters in the district.
- Kouna, or water reed is unique product of district, which is used for making bags, mats, boxes, etc. It has both local and international demand.
- Embroidery, pottery and cane products are also made in the district under self-help groups or NGOs.

IT, Call Centre:

- The district administration is keen to develop IT/ITeS sector.

6.8 Ukhrul

Ukhrul is one of the oldest districts of Manipur. It is situated 83 km from the State capital – Imphal. It is the land of the colourful *Tangkhuls*. It is a hill district, with a second lowest population density in Manipur at 31 persons per sq. km. (after Tamenglong district).

6.8.1 Economy

As of 2005-06, the district had a DDP of Rs29,266 lakh. Its per capita income was Rs18,653. The district is primarily agrarian in nature.

6.8.2 Demography

Ukhrul's share in Manipur's land area is 20.4 per cent. However, its share in State's population is at 6.7 per cent only. Thus, the population density in the district is low at just 40 persons per sq.km. The district has 100 per cent rural population. It has the highest percentage of tribal population in the State at 95.5 per cent of its total population. Literacy rate is 81.8 per cent.

6.8.3 Infrastructure

Infrastructure in the district needs more development. Drinking water facilities are available in all the 198 inhabited villages in the district. Electricity supply is, however, available in 154 villages.

TABLE 36: INFRASTRUCTURE FACILITIES IN UKHRUL

Facilities	Number of villages
Drinking water facilities	198
Safe Drinking water	110
Electricity (Power Supply)	154
Electricity (domestic)	154
Electricity (Agriculture)	Nil

Source: Census 2001, IMaCS Analysis

Education Infrastructure:

As of 2001 Census, primary schools were available in 188 out of 198 inhabited villages in the district. Middle schools were available in 79, secondary schools in 36 and colleges in one village.

TABLE 37: EDUCATION INFRASTRUCTURE IN UKHRUL

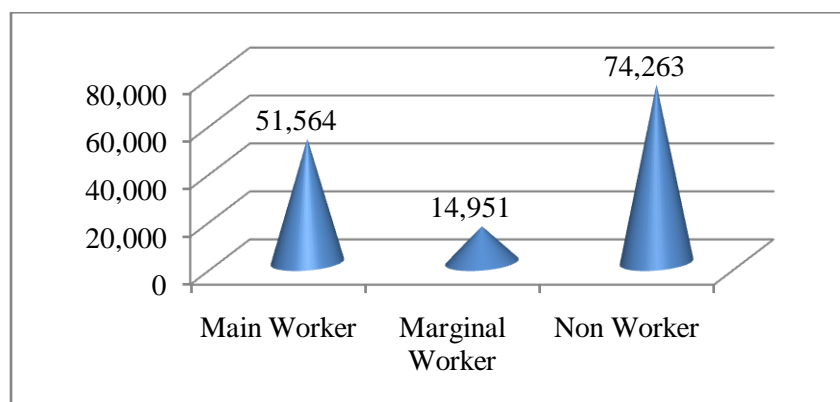
Institute	No. of villages
Primary school	188
Middle schools	79
Secondary/Sr Secondary schools	36
College	1

Source: Census 2001, IMaCS Analysis

6.8.4 Employment Pattern

Ukhrul district has a total of 66,515 workers, bringing the working population ratio as a percentage of total population at 47 per cent. About 78 per cent of the workers are main workers, while the remaining are marginal workers.

FIGURE 19: EMPLOYMENT PATTERN IN UKHRUL DISTRICT



Source: Census 2001, IMaCS Analysis

6.8.5 Potential sectors in district

Based on the factor advantages, following sectors have been identified in the district for skilling and upgrading skills:

Handicraft and Arts:

- Ukhrul is well known for its traditional Nungbi pottery.
- Music and musical instruments are important in the Tangkhuls culture.
- Sericulture is a traditional household activity.

Tourism:

- Ukhrul has potential for development as a tourism destination.
- Some of the district's attractions include Khayang Peak, Khangkhui Cave, Flower Garden, Kachouphung Lake, Dilily Water Falls, and Saline Springs.
- Being a mountainous region, the birds, animals, flowers and plants offer opportunities for developing nature tourism and walking trails.

Construction:

- Construction and upgrading the road infrastructure is a key activity planned for Ukhrul district.
- There is several construction work under the MNREGA.

PART – II (d): Skill Gap Analysis

7.1 Handloom and Handicraft

Wood craft

- Manipur's wood craft is of superior quality; Can fetch Rs. 100-2,000 a piece; Flower vases, tribal crafts; Sold locally or on bulk order.
- Work mostly done with hand with basic cutting and chiselling hand tools; Work conditions are poor. Master craftsmen of SHGs provide basic training; Productivity: 8-10 pieces per month per craftsman.

Kouna, cane and bamboo

- Kouna grown in paddy fields: once sown, 3-4 crops a year for 15 years; Cane grows as windings on trees: one crop in 3-4 years; Needs forest cover to grow; Bamboo grows on lower hills.
- Large scale plantations required for commercial exploitation of bamboo; Climate and soil conditions well suited for growing.
- Products: Bags, hats, floor mats, table mats, furniture, household items such as containers, decorative pieces such as wall clocks; 50-60 pieces per month per person; Each SHG of 10-15 members; Women-centric.
- Packaging and transportation of products a major concern.
- Marketable products, new tools and techniques, quality work sheds and modern skills necessary for better productivity and margins.

Flowers

- There is an orchidarium just outside Imphal; Over 110 varieties of orchids can be found there; Bloom season: March-May.
- Not commercially exploited; Tissue culture facilities required to develop plantations; Policy support and skills also necessary.

Dry flowers

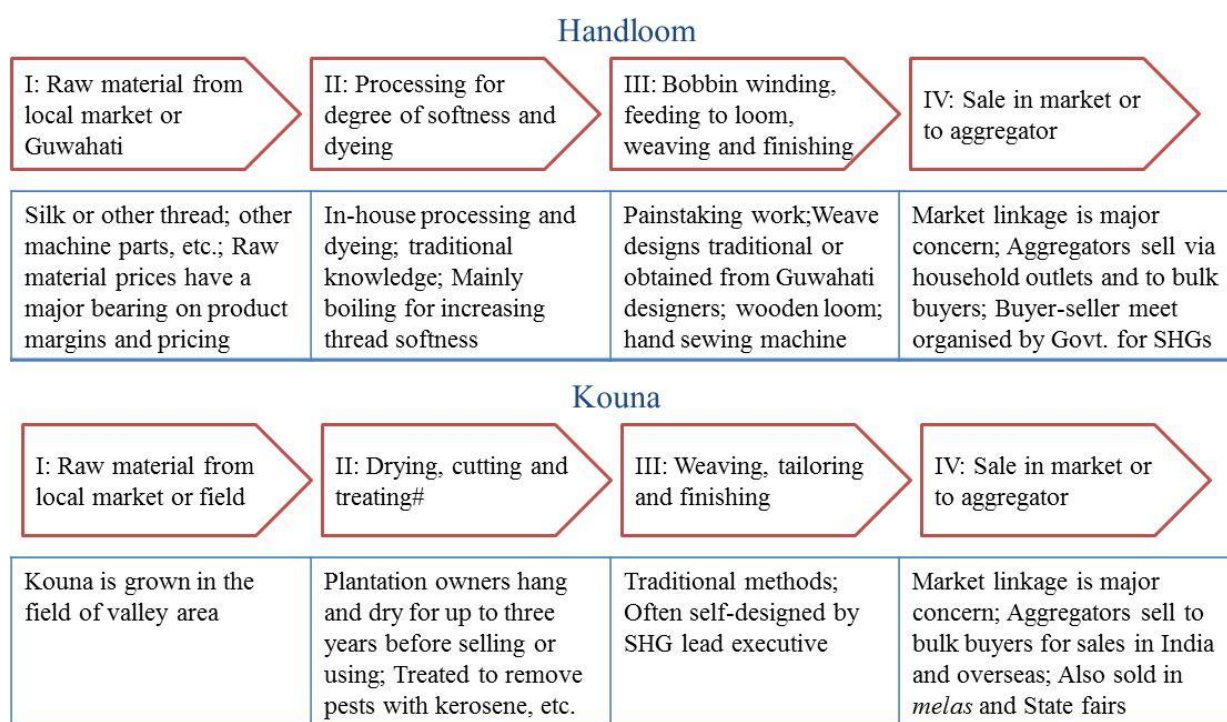
- Combination of forest based products used to make artificial flowers: peepal leaves, cones, sticks, jute, sola from West Bengal, etc.

- Manual collection of raw materials from forest by friends and family; Competitive quality and remunerative; New products adopted to compete with international products that come through the border.
- Currently, only few SHGs are involved; Mostly self-trained; Transport of delicate flowers results in giving up big orders from long distance; Flowers mainly sold in melas in other states.

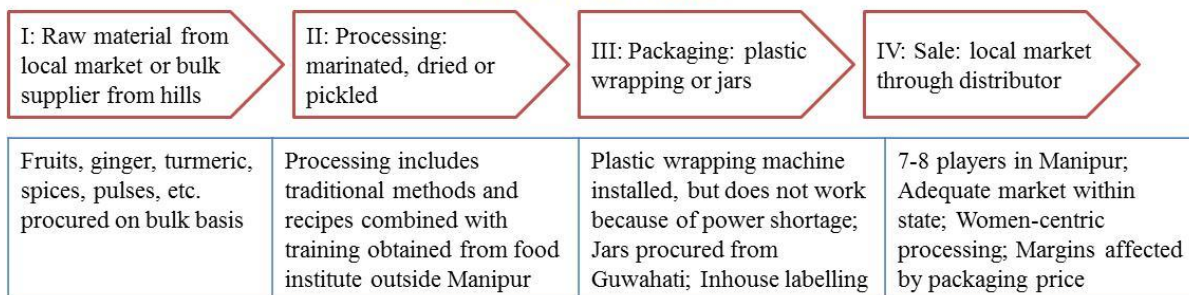
Home food products and bee keeping

- Traditional industry, but new entrepreneurial activity; Training required in food products manufacturing process; Packaging obtained primarily from Guwahati; Women-centric home-based procurement and sales; Product: pickles, cheweys; Raw material procured locally.
- Apiculture techniques not well developed, although climate supports it.

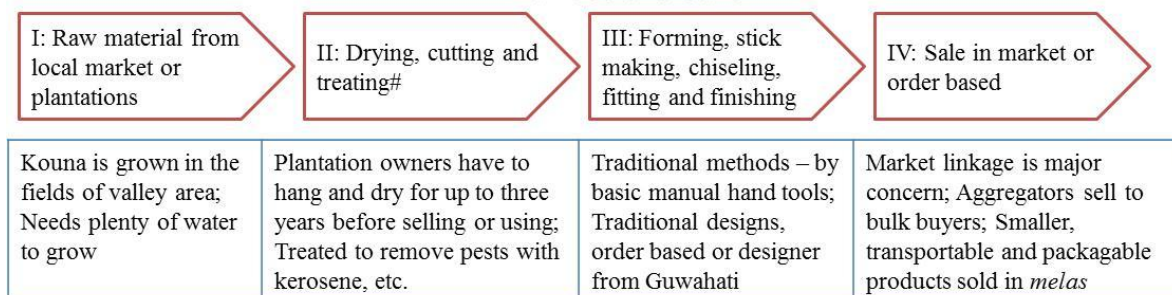
FIGURE 20: BUSINESS PRACTICES IN MANIPUR’S HANDLOOM & HANDICRAFTS SECTOR



Home Food Products



Bamboo and Cane



#Drying process can be reduced to 15 days with the use of drying machines

Sources: IMaCS Survey and Analysis

7.1(a) Skill mapping and gap analysis in handloom and handicraft

Entity	Key role	Skill gaps
Master craftswoman/ craftsman	Create high margin and market-oriented products	<ul style="list-style-type: none"> Inadequate knowledge of markets for sourcing raw material competitively Inadequate knowledge of competitive products in market Limited ability to create designs and patterns in keeping with changing market trends Ignorance of computer aided design methods Reluctance and financial constraints for modern tools and electricity driven machines for non-weaving processes to improve productivity Poor training orientation for marketable products

Entity	Key role	Skill gaps
Crafts person	Quality and wastage awareness	<ul style="list-style-type: none"> • Scant knowledge of quality standards followed in market • Limited ability to judge products requirements according to market competition – market perception is regional not global • Ignorance of wastage reduction requirements • Limited design innovation to cater to local market requirements • Limited use of tools and techniques to scale up business and overcome periods on under-utilisation
Aggregator or agent	Networking for increasing sales	<ul style="list-style-type: none"> • Poor market intelligence gathering techniques – limited to regional market • Inadequate entrepreneurial skills

Entity	Expected competency
Master craftswoman/ craftsman	<ul style="list-style-type: none"> • Knowledge of markets for raw material procurement • Knowledge of competitive products in market • Ability to create designs and patterns in keeping with changing market trends • Adopting computer aided design methods • Adopting modern tools and electricity driven machines for non-weaving processes to improve productivity • Imparting training that is market oriented and develops interest in innovation • Use of varies samples and visual aids in market-oriented training
Crafts person	<ul style="list-style-type: none"> • Knowledge of quality standards (formal or informal) followed in market, especially, related to environment (e.g., pest treatment materials)

Entity	Expected competency
	<p>for natural products)</p> <ul style="list-style-type: none"> • Ability to judge products requirements according to market competition • Adoption of techniques to reduce wastage • Keeness to innovate in design and use of new tools and techniques to scale up business and overcome periods on under-utilisation
Aggregator or agent	<ul style="list-style-type: none"> • Micro-finance skills • Gathering market knowledge and collecting competitive samples • Learning new process techniques, trade trends and market standards • Assertive communication and negotiation skills

7.2 Food and food processing

7.2(a) Food and food processing

Entity	Key role	Skill gaps
Entrepreneur/ SHG lead executive	Creating market-oriented products at good profit margins	<ul style="list-style-type: none"> • Inadequate training in food technology and new processing methods • Raw material procurement at competitive prices • Food packaging techniques and use of tools • Market expansion through bulk deals and quality improvement • Inability to scale up because of lack of bulk-training tools and techniques • Poor market intelligence outside state

Entity	Key role	Skill gaps
		<ul style="list-style-type: none"> • Branding and visibility techniques • Assertive communication and negotiation skills
Workers	Quality standards and scalability	<ul style="list-style-type: none"> • Awareness of new skills and technology for scalability • Acceptance of new skills and techniques • Awareness of quality standards for international competitiveness
Distributor	Market creation	<ul style="list-style-type: none"> • Market distribution limited to markets within state • Brand and value awareness creation • Assertive communication and negotiation skills

Entity	Expected competency
Entrepreneur/ SHG lead executive	<ul style="list-style-type: none"> • Food technology specialist along with traditional knowledge of processing and tastes (regional and outside) • Ability to source raw material at competitive prices • Financing skills • Use of modern food packaging techniques and machines • Ability to expand market beyond state through bulk deals with large entities and innovative products of required quality standards • Use of bulk-training tools and techniques of members for scaling up • Developing market intelligence outside state • Introducing branding and visibility techniques • Developing assertive communication and negotiation skills

Entity	Expected competency
Workers/ members	<ul style="list-style-type: none"> • Interest in new skills and technology for scalability • Awareness of quality standards for international competitiveness
Distributor	<ul style="list-style-type: none"> • Gathering market intelligence in terms of competitive and new products • Market expansion outside state • Brand and value awareness creation among potential buyers • Developing assertive communication and negotiation skills

The State Government has set up a Food Park in July 2011. Medium or large scale food processing units do not exist as of now.

- Climatic and soil conditions favour pineapple, lemon, orange, banana, chilly, ginger, passion fruit, bamboo shoots, turmeric, pepper, tomatoes, etc.
- There are about 15 small food processing units around Imphal, mostly organised under women's self-help groups; Products are sold locally.
- Food Park has common facilities for 55 entrepreneurs (in 1st phase) for processing fruits, spices, fish, meat and poultry.
- Common facilities include warehouse, cold storage, workshop, electricity, banking and post facility, water supply and Connectivity Bridge to Nilakuthi (location of Food Park).
- Proposal has been floated for a tetra pack unit under a scheme of Ministry of Commerce for packaging and labelling facility.
- Most fruits are produced in the hill districts; Lack of cold storage units and poor transportation from hill to market – major reasons for wastage and low price realisations; Multiple-cropping practised.
- State Government still to attract entrepreneurs to Food Park; Four-five final applicants.
- Small fruit processing self-help groups do not have packaging facility and selling capacity.
- Seasonality and high cost of inputs for processing and packaging, make end product expensive.
- Average payback period varies from one to 4 years depending on plant type; About 8 tonnes of pineapples yield 1tonne of juice concentrate and 2 tonnes yield a tonne of juice.

Higher productivity and quality certification are necessary. Focus on large scale production of one or two select products would improve salability.

- The quality of the products is good. There are no test labs, at present, for quality certification of products.
- Both hired and persons from the family work on plantations. Proper farmer training required on plantation, crop management, harvesting, and processing.
- State Horticulture Department provides training to farmers in model seed villages; More training needed to increase productivity.
- The present intake in Central Agricultural University is 70 in B.Sc. and 5-10 in PG; Passed out students go for further studies, some take up State Government job and some go overseas.

TABLE 38: DISTRICT WISE PLANTS GROWN

District-wise Plants Grown	
Senapati	Tuber crops such as potato and tapioca; Banana; All kinds of vegetables; Shallots; Tree Beans; Gooseberry; Orchids; Turmeric; Ginger; Bonsai and medicinal plants.
Tamenglong	Orange; Bamboo shoot; Lemon; All kinds of vegetables; Banana; Tree beans; Rubber; Tea; Gooseberry; Orchids; Turmeric; Ginger; Bonsai plants.
Chandel	Bamboo shoot; Banana; Tree beans; All kinds of vegetables; Passion fruits; Turmeric, Ginger; Gooseberry; Medicinal plants.
Ukhrul	Lemon; Banana; Tree beans; Gooseberry; Shallots; Tea
Churachandpur	All kinds of vegetables; Banana; Tree beans; Rubber; Turmeric; Ginger; Pineapple; Passion fruits; Gooseberry; Medicinal plants; Bonsai Plants
Valley: Imphal, Thoubal, Bishnupur	All kind of vegetables; Pineapple; Banana; Mango, Passion fruit ; Shallots; Tuber crops; Chinese Chive; Tree bean; Arecanut; Water Melons; Ginger; Turmeric; Orchids; Bonsai and medicinal plants.

Sources: IMACS Survey and Analysis

Organic certification is a double edged sword. Primitive techniques and competition among North Eastern states makes pricing important.

- Fruits and vegetable are grown organically; While organic certification could help increase prices, lack of market warrants that prices be maintained low.
- Predominant use of manual or animal operated implements.
- Local pineapple and orange growers hold annual fairs to increase quality awareness of the fruits; Prices have increased; however, few long term buyers.
- Almost every state in the North East grows similar fruits and vegetables because of similarity of soil and climatic conditions; each state consumes its own, as of now.
- Grades and tastes vary by state; each claims its fruit is the best quality and organic.
- From planting to transport to market, costs increase to rates at which planter get little profit at market price; Middlemen and bulk (processing) buyers demand lower prices.

TABLE 39: COMPARATIVE YIELD PER HECTARE AND SHARE AT ALL-INDIA LEVEL

Product	Yield (Tonnes/Hectare)		Manipur as percentage of all-India	
	Manipur	All-India	Area	Production
Fruits	8.06	11.22	0.7%	0.5%
Vegetables	10.49	16.17	0.2%	0.1%
Spices	0.87	1.58	0.3%	0.2%

Sources: Directorate of Economics and Statistics, Ministry of Agriculture; IMAcS Survey and Analysis

7.2(b) Skill mapping and gap analysis in food and processing industry

Entity	Key role	Skill gaps
Plantation grower	Producing fruits and vegetables	<ul style="list-style-type: none"> • Knowledge of soil, weather, scientific cultivation methods, irrigation techniques • Cropping for income throughout the year • Certifications and produce quality labelling • Pre-cooling and warehousing techniques • Market knowledge • Optimum transportation knowledge • Contract farming
Farm extension workers	Plantation maintenance and production	<ul style="list-style-type: none"> • Knowledge of soil, weather, scientific cultivation methods, plant protection, and irrigation techniques • Acceptance of new skills and techniques • Awareness of quality standards for competitiveness
Food processing entrepreneur	Producing and selling processed foods	<ul style="list-style-type: none"> • Food technology and processing methods • Preservation, packaging and storage • Alternative products • Market distribution, trade and pricing • Brand and value awareness creation • Assertive communication and negotiation skills

Entity	Key role	Skill gaps
Warehousing and Cold-chain operators and managers	Preserving quality of food in storage and transit	<ul style="list-style-type: none"> • Types of warehousing for each product and at transit points • Essentials of cold chain infrastructure maintenance for produce from farm to buyer • Types of refrigeration/cold storage at different stages • Quality standards
Transporter or aggregator	Reaching food from farm to processor or buyer	<ul style="list-style-type: none"> • Awareness of new forms of food transport • Quality standards for foods • Modes of transport for different markets

Entity	Expected competency
Plantation grower and farm worker	<ul style="list-style-type: none"> • Scientific methods for soil testing, seeds, planting (including high density planting), spacing, nutrition, irrigation methods for different seasons, nutrition, weeding, mulching, use of approved chemicals, plant protection and disease management techniques, post-harvest grading, storage (including pre-cooling) and packing • Multi-crop and multi-farm work (under MNREGA) for income through the year; Contract farming requirements • Certifications and produce quality labelling for branding and exports • Market pricing and demand supply assessment for year's crop • Knowledge of refrigerated transportation, product mixing, temperature and humidity control at farm warehouse for maintaining product quality. • Computer skills
Food processing entrepreneur	<ul style="list-style-type: none"> • Food technology and processing technology • Use of machinery and cold chain management knowledge

Entity	Expected competency
	<ul style="list-style-type: none"> • Preservation, packaging and storage techniques for quality assurance • Alternative products such as fruit-based cosmetics, fibre from pineapple • Market development, import/export markets/requirements and pricing skills • Brand and value awareness creation • Assertive communication and negotiation skills

Entity	Expected competency
Warehousing and Cold-chain operators and managers	<ul style="list-style-type: none"> • Storage at farm level, transport, cold storage near processing plant or at railway/airport • Refrigeration and control of temperature, humidity, air flow, etc. • Separation of products to avoid inter-product smells • Appreciation of quality standards required at consumer's end • Waste reduction and management • Margins and pricing knowledge
Transporter or aggregator	<ul style="list-style-type: none"> • Refrigeration, and control of stacking, temperature, humidity, air flow, etc. • Separation of products to avoid inter-product smells • Appreciation of quality standards required at consumer's end • Margins and pricing knowledge • Waste reduction and management

7.3 Hotels

- There is only one 3-Star category hotel, located in Imphal; extremely popular; Three-four years old.
- Insurgency news is a big deterrent to tourism.
- Lifting off permit norm for foreigners may help increase foreign tourist inflow in coming years; some foreign arrivals started from Japan, Thailand, Europe: mainly business trips.
- Easing of land norms may also help.
- Very few eateries or restaurants for middle-class.
- Transportation costs are high.
- Several picturesque, but undeveloped spots in state.
- State Government and local hotelier send residents outside Manipur for skill development in hospitality.
- Airport at Imphal has improved tourist inflows; Rail connectivity being developed.

TABLE 40: WELL-KNOWN TOURIST SPOTS IN MANIPUR

Well-known tourist spots			
➤ Loktak lake	➤ ShriGovindaji temple	➤ Langthabal	➤ Keibul Lam National Park
➤ Sendra Island	➤ Khwairamband Bazar (IMA market)	➤ Kaina	➤ Moirang

Potential for tourism development

- Handloom and handicraft exhibition centres with live artisans/trainers and sales
- Pineapple (Imphal and Churachandpur) and orange (Tamenglong) festivals
- Eco and forest tourism in the hill districts and forests; Health tourism
- Imphal Orchidarium (owned by the State Forest Department)
- Sports tourism / museums (Manipur has produced several renowned national-level sports persons)
- Ukhrul as hill station and tribal tourism destination

- Eateries and restaurants in Imphal
- Border tourism (Moreh-Myanmar border)

TABLE 41: TOURIST ARRIVALS IN MANIPUR

Year	Tourist spots	Foreign tourists	Domestic tourists	Total
1990-91	29	185	90,685	90,870
1991-92	29	374	91,290	91,664
1992-93	29	221	62,374	62,595
1993-94	29	350	72,980	73,330
1994-95	29	370	82,798	83,168
1995-96	29	288	84,025	84,313
1996-97	29	219	87,074	87,293
1997-98	31	173	91,620	91,793
1998-99	31	294	89,664	89,958
1999-00	29	335	99,399	99,734
2000-01	29	409	103,854	104,263
2001-02	41	131	73,842	73,973
2002-03	41	227	89,829	90,056
2003-04	41	296	93,430	93,726
2004-05	41	248	97,054	97,302
2005-06	41	348	93,331	93,679
2006-07	42	263	120,572	120,835
2007-08	54	460	101,000	101,460
17-year CAGR	4%	6%	1%	1%

Sources: Economic Survey Manipur, 2008-09; IMaCS Survey and Analysis

7.3(a) Skill mapping and gap analysis in tourism and hospitality

Activity	Entity	Skill gaps and expected competencies
Tourism	Tour operators, logistics operators and activity trainers	<ul style="list-style-type: none"> • Package tour offering and management • Travel, ticketing and transport arrangement • Vehicle upkeep • Understanding IATA guidelines • Advertising and branding along with other channel partners at airports, key market places, online and on television • Event management – outdoor and indoor • Training related to musicians, fitness, adventure sports, forest trails, running arts and crafts centre for tourists, etc. • Security and well being of tourists • Customer relationship skills • Computer and multiple language skills
Hospitality: hotels and restaurants	Catering, housekeeping and management	<ul style="list-style-type: none"> • Chefs and restaurant managers • Hotel management skills • Quality assurance awareness • Knowledge of disaster management • Multi-lingual and culturally sensitive • Ability to follow set standards • Ease of transaction management (debit/credit card, etc.) • Computer skills • Professionalism and etiquette

7.4IT and Software

- There are seven to eight active IT entrepreneurs in Manipur; Revenue varies from Rs. 50-60 lakh to Rs. 4-5 crore per annum.
- Employment is up to 75 persons; Senior persons involved in design and architecture and fresh recruits in coding; Employees leave for lower paying government jobs when opportunity arises.
- Mostly dependent on State Government or Central Government projects; typically, project duration varies from 6 months to a year, depending on complexity of work; AMCs also.
- STPI infrastructure is helpful, but inadequate; Poor bandwidth, speed of 2mbps.
- BSNL is the only ISP company option; Private providers are either expensive or of poor quality.
- Better money in Government projects; Exports market competitive; There is low-cost benefit, but middlemen and poor standing among big market players makes it difficult to bag business.
- Better trained persons seek jobs outside state; Locally hired persons need retraining (bio-metrics, software development, networking, etc.); NIT, NIIT, Aptech are the major suppliers of trained IT persons; Fresh recruits paid Rs. 8,000-9,000; Experienced Rs. 20,000-25,000.
- There are six IT training centres of Government and around 25 private centres in Manipur, mostly located in Imphal; 110 annual intake in DOEACC and 99 per cent pass out.
- Poor law and order a major concern in expanding business, getting bank credit and attracting investments from outside state.

7.4(a) Skill mapping and gap analysis in IT and Software

Entity	Skill gap	Expected competency
--------	-----------	---------------------

IT entrepreneur	<ul style="list-style-type: none"> ▪ Competitiveness outside Manipur ▪ Employee retention ▪ Dependence on Government contracts 	<ul style="list-style-type: none"> ▪ Ability to establish tie-ups, business contacts outside state ▪ Ability to develop long-term job security through provident fund, pension, etc. ▪ Ability to develop new business areas based on local competencies in, say, arts
Call centre employee	<ul style="list-style-type: none"> ▪ Inadequate level of language skills ▪ Personality development, confidence and telesales skills 	<ul style="list-style-type: none"> ▪ Improved spoken and written English ▪ Multi-lingual communication ▪ Assertiveness and sales skills ▪ Personality development
IT education and trainer	<ul style="list-style-type: none"> ▪ Focus on traditional courses ▪ Institutions lack industry-linked faculty 	<ul style="list-style-type: none"> ▪ Web technology for animation, mathematics and programming for gaming, ‘midi’ for music, etc. ▪ Introduction of new technology

7.5 Fisheries

Fish produced within State is inadequate for meeting consumption demand. Estimated shortage is 47 per cent.

- About 98 per cent of fish in valley and 75 per cent in hills is consumed in fresh form; Rest are sun dried and smoked.
- Almost all agricultural households have fish ponds; In Bishnupur district alone, there are around 5,000 households in the Loktak Lake area who depend on fisheries for livelihood.
- Demand exceeds supply; Fish imported from Kolkata; Grass and other carp, katla, rahoo, mirgan, pengba, cat fish, ngapai, etc., are best suited for pisciculture in the state.
- Outdated fish farming techniques, low investment, lack of funds, natural disasters like flood and diseases are major impediments; there is no processing unit for fish in the state at present.

TABLE 42: MANIPUR - FISHERY

As of 2007-08 District	No. of fishery division	No. of fish farms	Total fish production (Tonnes)	Fresh fish sales (Tonnes)	Estimated demand (Tonnes)
Senapati	2	1	478	359	1,250
Tamenglong	2	2	467	351	1,250
Churachandpur	2	2	586	440	2,000
Chandel	2	2	387	291	1,250
Ukhul	2	1	486	365	1,750
Imphal East	2	3	986	937	3,250
Imphal West	4	2	3,824	3,633	9,750
Bishnupur	2	3	5,809	5,693	3,750
Thoubal	2	2	5,629	5,517	3,250
Manipur	20	18	18,652	17,586	27,500

Sources: Statistical Abstract Manipur, 2009; IMaCS Survey and Analysis

7.5(a) Skill mapping and gap analysis in fishery

Entity	Skill gap	Expected competency
Entrepreneur (processing)	<ul style="list-style-type: none"> ▪ Fish processing technology ▪ Ice factory linkage ▪ Knowledge of maintaining freshness ▪ Preserving, canning/packaging and labelling ▪ Sales and marketing 	<ul style="list-style-type: none"> ▪ Ability to establish fish processing unit with technology and new processing techniques ▪ Ability to develop market inside and outside state (tastes, trade, etc.) ▪ Storage and transport capabilities
Fish farmer	<ul style="list-style-type: none"> ▪ Inadequate knowledge of modern methods 	<ul style="list-style-type: none"> ▪ Pondage knowledge ▪ Use of modern fish farming techniques: breeding, feeding, disease protection, etc. ▪ Rearing of appropriate fish-mix for greater yield ▪ Preserving and storage techniques

7.6 Construction

Potential and existing construction activity in Manipur pertains to development of railway line, roads and proposed power projects.

- NHPC, State PWD, Railway Board are the key stakeholders in Manipur’s infrastructure development.
- Road projects range from small connecting roads to hamlets in the hills (under PMGSY or MNREGA) to highway improvement; Building projects have been outsourced (to Simplex); Water supply under PHED.
- PWD employees are mostly from the state; there are around 1,500 casual labourers; Inadequate skills – reason why big projects are outsourced to outside construction companies; Short-term training conducted by NITHE, NOIDA, for highway construction.
- Delays in many projects are mainly because of poor law and order situation, frequent road blockades on links where raw materials are brought through, and extortion.
- The rail link up to Tupul is to be completed by 2014 and the extension to from Imphal by 2016; Railways has its own training set up.
- NHPC has staff strength of 541 in Manipur; 60 per cent are from Manipur; Training provided in their own training sessions.
- Stone crushing of stones from river-beds is an allied industry; Requires little training, mostly for machine operations.

7.6(a) Skill mapping and gap analysis in construction

Entity	Skill gap	Expected competency
Construction labourer	<ul style="list-style-type: none"> ▪ Basic skills lacking 	<ul style="list-style-type: none"> ▪ Masonry and civil works ▪ Carpentry ▪ Machine operation ▪ Electric works ▪ Welding ▪ Street furniture, fixtures and signage ▪ Knowledge of road erosion, sediment

Entity	Skill gap	Expected competency
		control, drainage, jointing, sloping, materials and optimum mixes, excavation, rock management, grading, compacting, road maintenance, pavements, joint sealing, barriers and safety, etc.

7.7 Border Trade

- Manipur shares 398 km of international border with Myanmar; Moreh-Tamu border point is most suited for cross-border trade.
- It is also the most active border trade centre among the 13 locations identified by the Government of India for integrated check posts.
- Trade has increased from Rs. 95.48 million in 2001-02 to Rs. 298.19 million in 2009-2010.
- Land customs station exists; Integrated check post is being developed.

TABLE 43: FACILITIES AT INTEGRATED CHECK POST

Facilities at Integrated Check Post	
Immigration department	Bank counter
Police and women constables	Animal and plant quarantine
Land customs department	Quality certification & food testing agency
Customs preventive department	Trade facilitation counter
Forests department	Truck parking
Narcotics & drug control department	Staff quarters
Postal department & telecom	Rest house

7.7(a) Skill mapping and gap analysis in border trade

Entity	Skill gap	Expected competency
Traders	<ul style="list-style-type: none"> ▪ Banking norms ▪ Taxes and duties ▪ Trade and transactions 	<ul style="list-style-type: none"> ▪ Letter of credit with bank ▪ Knowledge of taxation and duties on traded goods for both sides ▪ Exchange rate implications ▪ Import-export procedures ▪ Import-export documentation ▪ Categorisation of traded goods and declarations, etc. ▪ Precedence clause – whether imports/exports from India precede in exchange mechanism ▪ Knowledge of Foreign Trade Agreements

7.7 Other potential sectors

Healthcare professionals

- Manipur has two medical colleges; RIMS: teaching staff – 257; PG students – 150; Interns – 65-70
- Most medical doctors practice within state; some go to other states or overseas; For major surgeries, patients are referred to hospitals in Guwahati, Kolkata, Delhi, etc.; Lack of modern equipment, a major impediment.
- There are three major nursing colleges; Directorate of Health Services, Manipur, has plans to set up seven nursing institutes in the districts; To be funded by Ministry of Health, Government of India; Delayed from Eleventh Plan Target

Automobile mechanics

- Repairing done for two and four wheelers, and heavy vehicles. For heavy vehicles – two types of units, i.e., body making and engine repairing; Mostly located in Imphal; Power shortage, a major constraint.
- There are around more than 300 units in Imphal; About 5-10 persons in each unit; Mechanics (non-authorised dealer) are trained on the job; No formal training
- Large and medium size vehicles are sent to Guwahati or Dimapur; Trends reversing.

Sports trainer

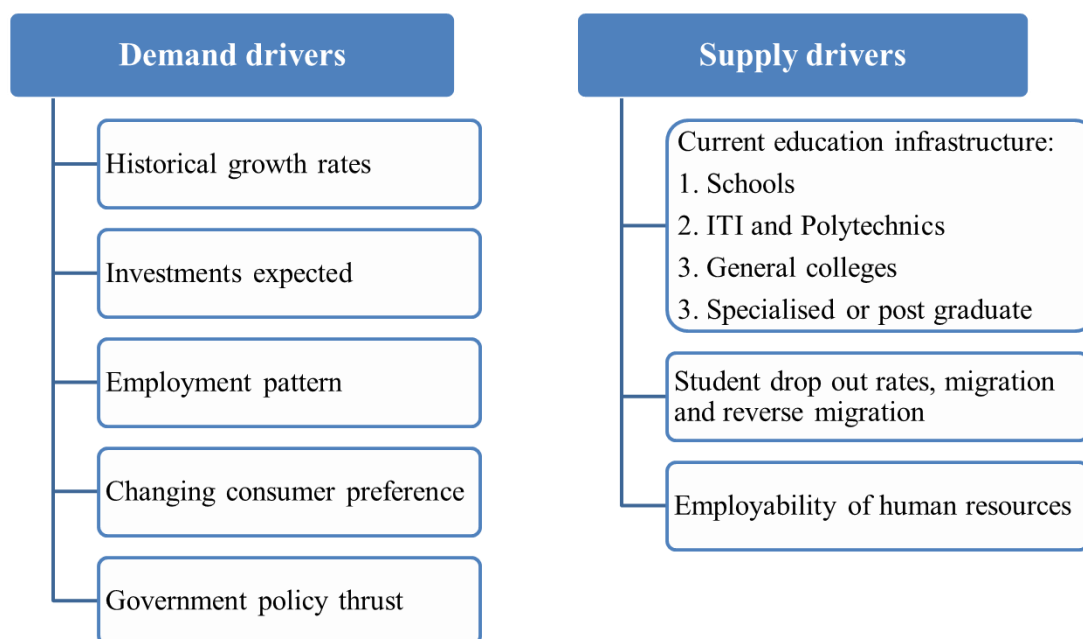
Manipur has produced many national and international award winning athletes (wrestling, boxing); Football, Martial arts and Polo also popular.

PART – II (e): Forecasting of Human Resource Requirement

8.1 Human resource forecasting model

IMaCS has developed a model for estimating human resources requirement for the state based on growth of potential industries at district level. The model is depicted diagrammatically as follows:

FIGURE 21: HUMAN RESOURCES FORECASTING MODEL

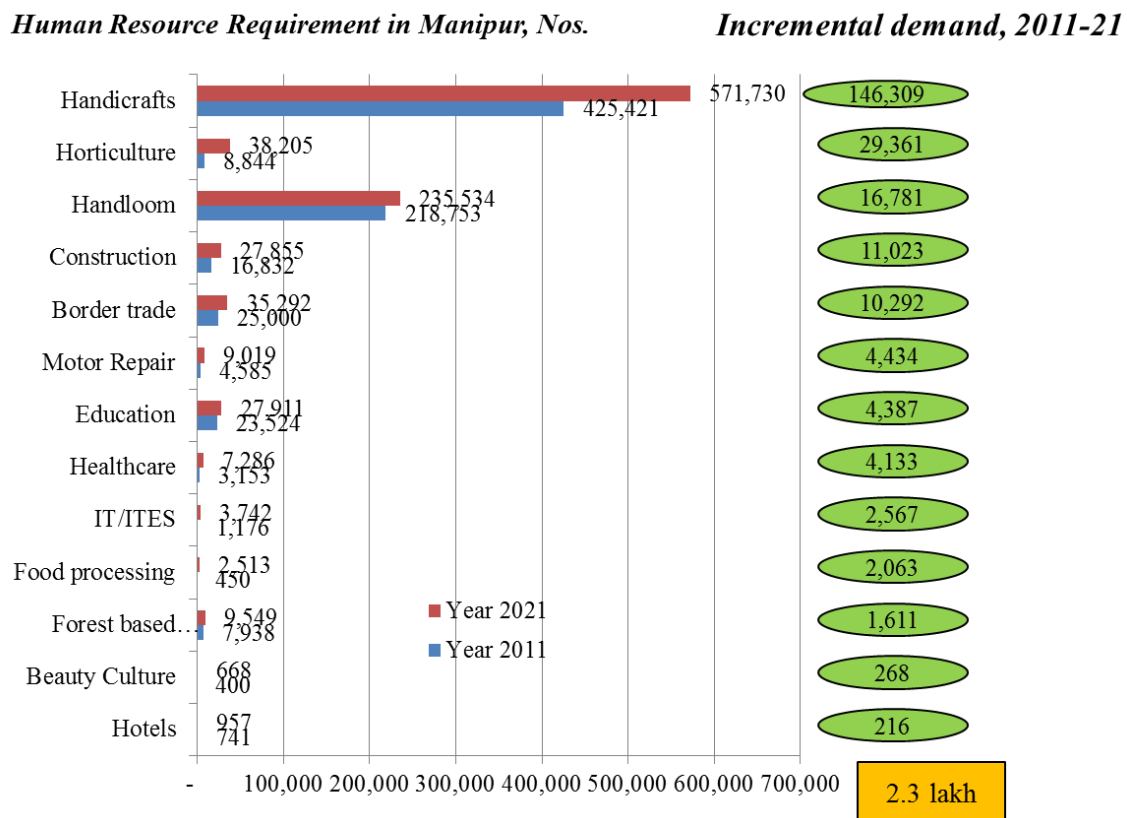


Source: IMaCS Analysis

8.2 Incremental demand in Manipur

According to our estimates, Manipur will have an incremental demand of around 2.30 lakh persons between 2011 and 2021. Most of this will come from handicrafts, followed by horticulture and handloom. In addition, an extra demand of about 7 per cent may be created as the people in the age-groups of 50 to 60 years retire in the next 10 years.

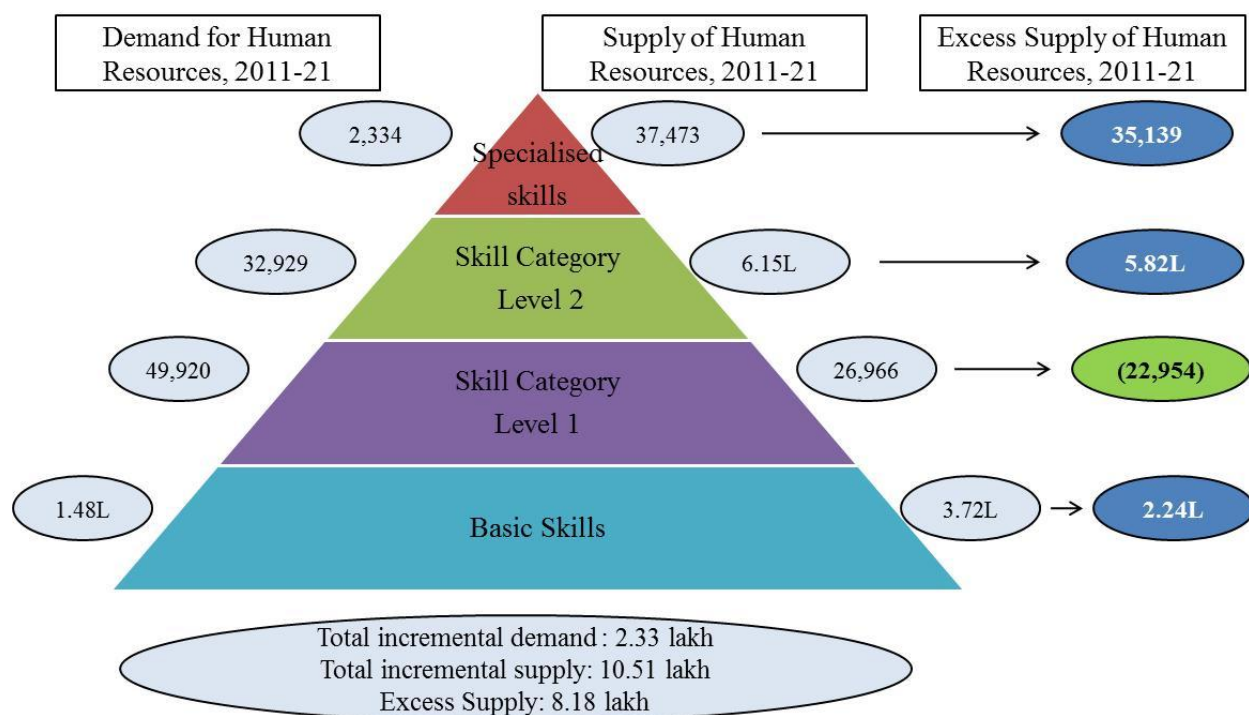
FIGURE 22: HUMAN RESOURCES REQUIREMENT IN MANIPUR



Source: IMaCS Analysis

The demand is expected to fall short of supply, leaving an excess supply of human resources of 8.18 lakh. The IMaCS skill pyramid analysis indicates that while there will be excess supply at the top two tiers of the pyramids, there will be a small excess demand at the bottom two tiers of the pyramid.

FIGURE 23: DEMAND AND SUPPLY OF HUMAN RESOURCES IN MANIPUR



Specialised skills include: master weavers, food technologist, PhDs, Designers, etc.
Source: IMaCS Analysis

8.3 District-wise human resource requirement in Manipur – 2011-21

We have estimated incremental human resources requirement at district level for all the sectors. From that, we can see that maximum demand between 2011 and 2021 is expected to come from Thoubal district, followed by Imphal (East and West together).

TABLE 44: MANIPUR'S DISTRICT WISE INCREMENTAL HUMAN RESOURCES REQUIREMENT: 2011-2021

Districts / sectors	Human Resource Requirement in 2011 and 2021													
	Handloom	Handicrafts	Horticulture	Food processing	Hotels	IT /ITES	Health care	Education	Motor Repair	Border trade	Beauty Culture	Construction	Forest based industry	Total
Bishnupur	2,622	27,957	3,559	-	-	150	689	401	90	-	33	-	1,579	37,081
Chandel	670	-	-	-	-	-	-	233	90	10,292	-	-	-	11,284
Churachandpur	1,942	1,864	8,897	-	70	-	-	440	90	-	-	-	32	13,334
Imphal West		18,638	-	2,063	46	1,134	1,378	809	2,355	-	167		-	
Imphal East	4,537	18,638	-	-	70	1,134	1,378	763	1,448	-	33	8,407	-	62,999
Senapati	2,186	-	3,559	-	-	-	-	589	90	-	-	1,495	-	7,919
Tamenglong	1,758	-	8,897	-	31	-	-	239	90	-	-	1,121	-	12,136
Thoubal	1,869	79,212	4,449	-	-	150	689	556	90	-	33	-	-	87,049
Ukhrul	1,197	-	-	-	-	-	-	356	90	-	-	-	-	1,644
Manipur	16,781	146,309	29,361	2,063	216	2,567	4,133	4,387	4,434	10,292	268	11,023	1,611	233,446

Source: IMaCS Analysis

8.4 Stakeholder feedback

IMaCS has interacted with different stakeholders in the State, to gauge their views on skill requirements in Manipur. The Stakeholder feedback is given in the table below.

TABLE 45: STAKEHOLDER FEEDBACK

Stakeholder	Key findings
Industry feedback (overall)	<ul style="list-style-type: none"> • Need to create infrastructure (roads, electricity, telecom) to reduce cost of production and transportation; Transportation increases costs by almost double the production costs making economic activity unviable • Each state should focus on a few key economic areas for development rather than trying everything
<i>Sector-specific feedback</i>	
Handloom and Handicrafts	<ul style="list-style-type: none"> • Raw material sourcing adds to cost; Despite factor advantages raw materials such a threads not available from within the State, e.g., in sericulture • Products are high priced, sold in melas and trade fairs • Facilities for transportation and packaging of large and odd shaped goods not available • Training provided locally, infrastructure inadequate • Younger generation not interested in working in traditional sectors
Horticulture and fruit processing	<ul style="list-style-type: none"> • Lack of cold storage facilities and transportation • Investors interested to explore areas such as oranges, chilly, ginger, pineapple • Newly created infrastructure in Imphal is not located close to plantations • Market linkage missing for most horticulture products

Stakeholder	Key findings
Hotels	<ul style="list-style-type: none"> • Considerable potential for tourism development, but little scope for hospitality and tourism investments unless law and order situation improves • Local tourist destinations have low footfalls because of constant military presence
IT / ITES	<ul style="list-style-type: none"> • Dependence on Government contracts • Human resources need to be retrained for software development and design • IT infrastructure coming up, bandwidth and electricity shortage major constraints
Forest based industry (wood products and dry flowers)	<ul style="list-style-type: none"> • Manual collection and crude storage facilities for raw materials • Outdated tools for creating products, productivity low • More training centres required for developing the sector • High priced products, sold mainly in melas and trade fairs • Market intelligence missing
Beauty Culture	<ul style="list-style-type: none"> • Training provided by State Government for local employment and migration • Migration training successful, but not always paid well • Local training, partly successful; Setting up shops may not always be viable enough to pay bank loans (not easily available)
Construction	<ul style="list-style-type: none"> • Construction activity undergoing in railways, roads, and bridges. • Locals not interested in working in construction jobs • Mostly dependent on unskilled labour from other states e.g., Uttar Pradesh, Bihar
Government feedback	<ul style="list-style-type: none"> • Focus on migration through training outside state in hospitality and beauty culture

Stakeholder	Key findings
	<ul style="list-style-type: none"> • Local training is attractive only because of subsidy involved; hence largely unsuccessful • Food processing is a focus area of development; infrastructure created recently, few takers yet
Educational institutions feedback	<ul style="list-style-type: none"> • Students from technical training institutes such as Engineering, IT and Plastics find employment, primarily, outside state. • Students from diploma courses go for higher level courses, high level of unemployment • Students from general colleges find local employment in Government or remain unemployed
Students / Unemployed youths feedback	<ul style="list-style-type: none"> • Open to explore opportunities outside the State, as locally opportunities are scarce • After getting exposure outside, willingness to come back if opportunities are presented • Preference for Government jobs • Lack of industry exposure
NABARD	<ul style="list-style-type: none"> • Introduction of new horticulture products is possible only when food-grain growing farmers have alternative subsistence level income during the period when crop has still not reached harvest period.

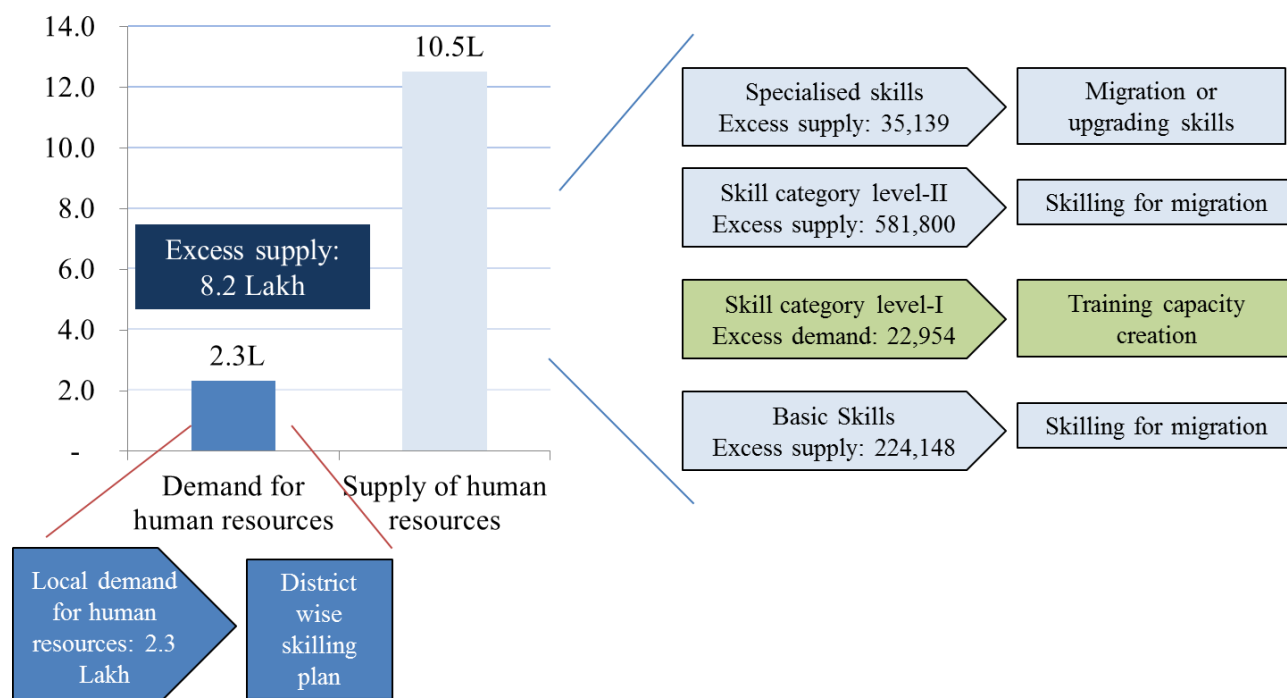
Source: IMaCS Survey

PART – III: Recommendations

9.1 Interventions for human resource Demand-Supply gap management

IMaCS has used the following framework of interventions for human resources demand-supply gap management:

FIGURE 24: DEMAND-SUPPLY OF HUMAN RESOURCES IN MANIPUR – 2011-21

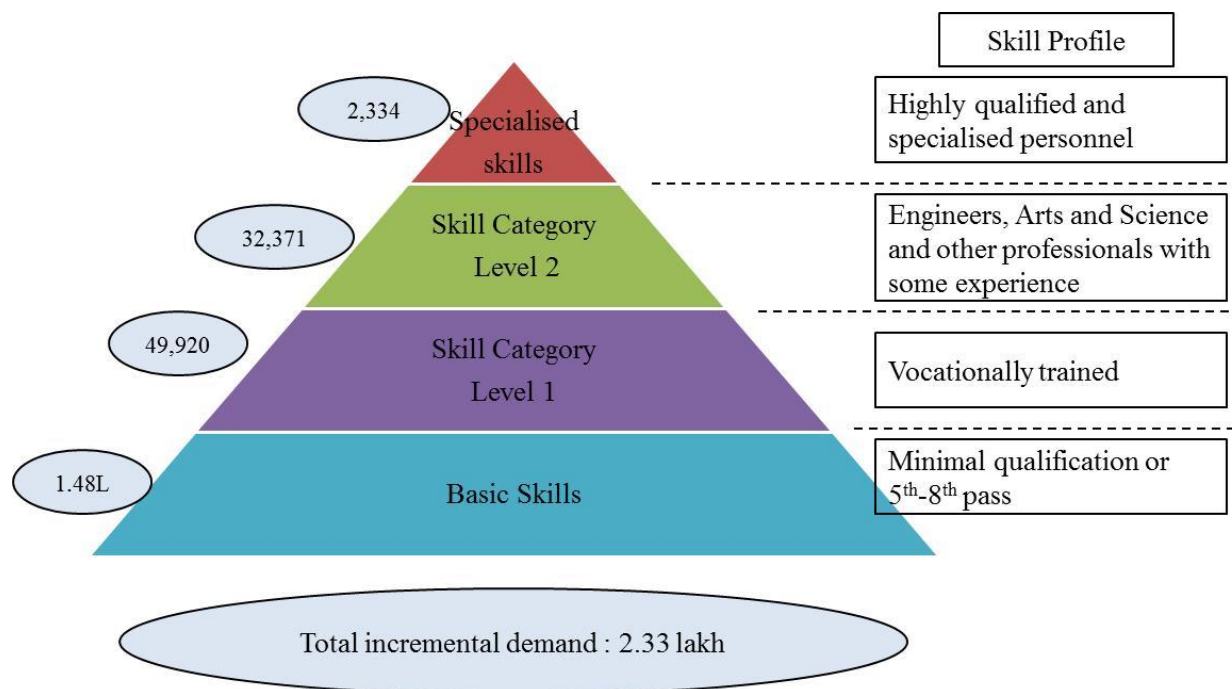


Source: IMaCS Analysis

9.2 Areas for skilling within state – 2011-21

Areas for skilling within the State have been identified at different levels of the pyramid.

FIGURE 25: AREAS FOR SKILLING WITHIN STATE BETWEEN 2011 AND 2021



Specialised skills include: master weavers, food technologist, PhDs, Designers, etc.
 Source: IMaCS Analysis

Locally, around 2.33 lakh persons will be demanded from various existing and up-coming sectors in the State in the next 10 years. Another seven per cent may be added due to persons working in the 50-60 year age group, who may come up for retirement in the 10 years.

FIGURE 26: AREAS FOR SKILLING FOR DEMAND SECTORS IDENTIFIED WITHIN MANIPUR

Sector	Basic Skills: 1.48 L	Skill Category Level-I: 49,920	Skill Category Level-II: 32,371	Specialised Skill: 2,334
Handloom	Weaving	Weaving	Entrepreneurship	Weaving at Master level, Designing
Handicraft	Artisanship	Artisanship	Entrepreneurship, Agent	Craftspersonship at Master level
Horticulture	Growing	Farm extension services	Entrepreneurship	Marketing
Food Processing	Working at Shop floor	Distribution, packaging	SHG lead executive, Entrepreneurship	Food technologist, Management
Hospitality	Housekeeping	Chefs, Attendants	Manager, Entrepreneurship	Tourism package development planning
IT / ITES	Data entry personnel	Call centre: customer service, helpline	IT entrepreneurship, training	IT system specialist
Healthcare	-	Paramedics	Nurses and Doctors	Specialists
Education	-	-	Teachers, Principals	Researcher, Trainer
Motor Repair	Mechanical work	Mechanical work	Entrepreneurship	
Border Trade	Helping: loading	Logistic providers, trading	FTA Specialist	Training
Beauty	-	Beauticians	Manager, Agent	Hair and skin

Sector	Basic Skills: 1.48 L	Skill Category Level-I: 49,920	Skill Category Level-II: 32,371	Specialised Skill: 2,334
Culture				specialists
Construction	Construction labourer	Mason, Welder, Machine operator, Electric Works	Agent, Contractor	Project manager
Forest based	Growing, cutting, collecting	Craftsmanship	-	-

In addition to the areas identified above, there will also be continued demand in livelihood activities like agriculture, fishery and animal husbandry.

FIGURE 27: LIVELIHOOD ACTIVITIES IN MANIPUR WHICH NEED SKILL UP-GRADATION

Activity	Description	Skill level	2011 employment
Agriculture (Cultivation)	Rice and maize are two main cereal crops cultivated in Manipur. About 22% of the area is under 'jhum' cultivation.	Mostly, unscientific methods of cultivation used.	379,705
Fishery	About 98% of the fish in Valley and 75% of the fish in Hills is consumed in fresh form. Rest is sun dried	Outdated fish farming techniques used.	800

Activity	Description	Skill level	2011 employment
	and smoked.		
Apiculture	Traditional industry, but new entrepreneurial activity is emerging.	Traditional skills used for bee-keeping.	9,183
Animal Husbandry	Includes rearing of animals for beef, sheep meat, goat meat, eggs, chicken and milk.	Household activity with primitive rearing, feeding and processing skills.	17,014

Additional work force that may be available for skill up-gradation in livelihood activities: 4.07 lakh

9.3 Skilling for migration

An excess pool of working population of around 81,813 persons is expected to be available per year for migration outside the State during the period 2011-21. In the absence of local job opportunities, this pool would be required to be trained for skills that are in demand outside state. The sectors identified based on local aptitude and interests are mainly in the services and highly skilled areas.

FIGURE 28: AREAS FOR SKILLING FOR MIGRATION TO OTHER STATES OR OVERSEAS

Minimal Education:	Skill Category Level-II:	Skill Category Level-I:	Specialised skills:
Security guards	Basic accounting	Banking and accounting	Management training
Auto-mechanics	Retail services	Hotel and retail services	Entrepreneurial skills
Cook	Office assistant	Secretary	Project management skills
Service staff in healthcare and hospitality	Beauty culture	IT	
Language training	Nursing and paramedics	Beautician and health assistants	
Ground staff at airports	Insurance agent	Sales and marketing management	
	Sales person, Export/import	Food technology	
	Event manager	Textile and apparel designer	
	Call centre executive	Plastics technology	
	Technician - cellphones	Fashion technology	
	Computer skills	Computer skills	

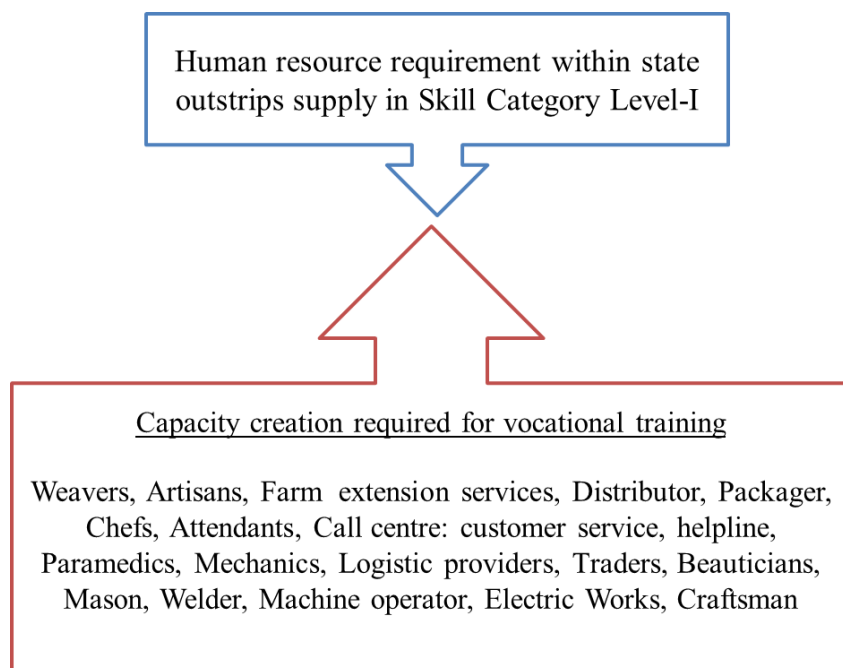
Potential for local-talent development through CoE: Sports academy and Performing Arts centre

CoE: Centre of Excellence; Source: IMaCS Analysis

9.4 Capacity creation within State

The human resource needs to be skilled across the sectors which present employment opportunities and the capacity needs to be created to achieve the same.

FIGURE 29: INTERVENTION FOR CAPACITY CREATION WITHIN THE STATE



Source: IMaCS Analysis

9.5 Private sector skill development opportunities at the district level

9.5.1 Bishnupur– skilling interventions

Healthcare professionals

- Nurses training for day care, emergencies and critically ill patients
- Paramedics training: ward boys, nursing orderly, pharmacist, medical record officer, mobile healthcare service, ambulance attendants, emergency outside hospitals, etc.

Fisheries

- Pondage knowledge
- Modern fish farming techniques: breeding, feeding, disease protection, etc.
- Rearing of appropriate fish-mix for greater yield
- Preserving and storage techniques
- Establishing fish processing unit with technology and new processing techniques
- Market development skills inside and outside state
- Storage and transport capabilities

TABLE 46: SKILL LEVEL WISE HUMAN RESOURCE REQUIREMENT IN BISHNUPUR

Incremental 2011-2021

Sectors	Hand loom	Handicrafts	Horticulture	Food processing	Hotels	IT/ITES	Healthcare	Education	Motor Repair	Border trade	Beauty culture	Construction	Forest based
Minimal education	1,794	19,129	2,459	-	-	42	240	-	58	-	9	-	1,091
Skill Category Level 2	556	5,929	646	-	-	40	233	-	21	-	9	-	287
Skill Category Level 1	246	2,619	418	-	-	66	209	397	10	-	15	-	185
Specialised skills	26	280	36	-	-	1	7	4	1	-	0	-	16

Incremental Phase-I: 2011-2016

Sectors	Hand loom	Handicrafts	Horticulture	Food processing	Hotels	IT/ITES	Healthcare	Education	Motor Repair	Border trade	Beauty culture	Construction	Forest based
Minimal education	-	8,859	799	-	-	27	120	-	45	-	4	-	521
Skill Category Level 2	-	2,746	210	-	-	26	117	-	16	-	4	-	137
Skill Category Level 1	-	1,213	136	-	-	43	105	198	8	-	6	-	88
Specialised skills	-	129	12	-	-	1	3	2	1	-	0	-	8

Incremental Phase-II: 2017-2021

Sectors	Hand loom	Handicrafts	Horticulture	Food processing	Hotels	IT/ITES	Healthcare	Education	Motor Repair	Border trade	Beauty culture	Construction	Forest based
Minimal education	1,794	10,270	1,660	-	-	15	120	-	13	-	5	-	571
Skill Category Level 2	556	3,183	436	-	-	14	117	-	5	-	5	-	150
Skill Category Level 1	246	1,406	282	-	-	24	105	198	2	-	8	-	97
Specialised skills	26	150	24	-	-	1	3	2	0	-	0	-	8

Some figures might not add up, due to rounding off of the decimal points.

Source: IMAcS Analysis

9.5.2 Chandel– skilling interventions

Border Trade

- Letter of credit with bank
- Knowledge of taxation and duties on traded goods for both sides
- Exchange rate implications
- Import-export procedures
- Import-export documentation
- Categorisation of traded goods and declarations, etc.
- Precedence clause – whether imports/exports from India precede in exchange mechanism
- Foreign Trade Agreements

Trade related economy

- Hospitality related
- Logistics: warehousing, preservation and storage; transportation: construction of dwellings and support infrastructure
- Technicians (electricians, plumbers, etc.)

TABLE 47: SKILL LEVEL WISE HUMAN RESOURCE REQUIREMENT IN CHANDEL

Incremental 2011-2021													
Sectors	Hand loom	Handicrafts	Horticulture	Food processing	Hotels	IT/ITES	Healthcare	Education	Motor Repair	Border trade	Beauty culture	Construction	Forest based
Minimal education	458	-	-	-	-	-	-	-	58	2,862	-	-	-
Skill Category Level 2	142	-	-	-	-	-	-	-	21	2,774	-	-	-
Skill Category Level 1	63	-	-	-	-	-	-	230	10	4,553	-	-	-
Specialised skills	7	-	-	-	-	-	-	2	1	103	-	-	-
Incremental Phase-I: 2011-2016													
Sectors	Hand loom	Handicrafts	Horticulture	Food processing	Hotels	IT/ITES	Healthcare	Education	Motor Repair	Border trade	Beauty culture	Construction	Forest based
Minimal education	-	-	-	-	-	-	-	-	45	572	-	-	-
Skill Category Level 2	-	-	-	-	-	-	-	-	16	555	-	-	-
Skill Category Level 1	-	-	-	-	-	-	-	115	8	911	-	-	-
Specialised skills	-	-	-	-	-	-	-	1	1	21	-	-	-
Incremental Phase-II: 2017-2021													
Sectors	Hand loom	Handicrafts	Horticulture	Food processing	Hotels	IT/ITES	Healthcare	Education	Motor Repair	Border trade	Beauty culture	Construction	Forest based
Minimal education	458	-	-	-	-	-	-	-	13	2,289	-	-	-
Skill Category Level 2	142	-	-	-	-	-	-	-	5	2,219	-	-	-
Skill Category Level 1	63	-	-	-	-	-	-	115	2	3,642	-	-	-
Specialised skills	7	-	-	-	-	-	-	1	0	82	-	-	-

9.5.3 Churachandpur– skilling interventions

Forest based activities

- Increasing productivity through proper use of tools and raw material collection techniques
- Gauging competition from other states and countries
- Creation of products in keeping with changing market trends
- Imparting training that is market oriented and develops interest in innovation
- Use of various samples and visual aids in market-oriented training

Handloom and handicraft

- Quality standards and certifications
- Assessment of competitive environment and sample collection
- Wastage reduction
- Innovation in design through use of new tools and techniques to scale up business and overcome periods of under-utilisation
- Micro-finance raising skills
- Assertive communication, language and negotiation skills
- Introduction of packaging materials and techniques, e.g., styrofoam

TABLE 48: SKILL LEVEL WISE HUMAN RESOURCE REQUIREMENT IN CHURACHANDPUR

Incremental 2011-2021													
Sectors	Handloom	Handicrafts	Horticulture	Food processing	Hotels	IT/ITES	Healthcare	Education	Motor Repair	Border trade	Beauty culture	Construction	Forest based
Minimal education	1,328	1,275	6,148	-	47	-	-	-	58	-	-	-	22
Skill Category Level 2	412	395	1,616	-	14	-	-	-	21	-	-	-	6
Skill Category Level 1	182	175	1,045	-	8	-	-	436	10	-	-	-	4
Specialised skills	19	19	89	-	1	-	-	4	1	-	-	-	0
Incremental Phase-I: 2011-2016													
Sectors	Handloom	Handicrafts	Horticulture	Food processing	Hotels	IT/ITES	Healthcare	Education	Motor Repair	Border trade	Beauty culture	Construction	Forest based
Minimal education	-	591	1,997	-	21	-	-	-	45	-	-	-	10
Skill Category Level 2	-	183	525	-	6	-	-	-	16	-	-	-	3
Skill Category Level 1	-	81	339	-	4	-	-	218	8	-	-	-	2
Specialised skills	-	9	29	-	0	-	-	2	1	-	-	-	0
Incremental Phase-II: 2017-2021													
Sectors	Handloom	Handicrafts	Horticulture	Food processing	Hotels	IT/ITES	Healthcare	Education	Motor Repair	Border trade	Beauty culture	Construction	Forest based
Minimal education	1,328	685	4,151	-	26	-	-	-	13	-	-	-	11
Skill Category Level 2	412	212	1,091	-	8	-	-	-	5	-	-	-	3
Skill Category Level 1	182	94	705	-	4	-	-	218	2	-	-	-	2
Specialised skills	19	10	60	-	0	-	-	2	0	-	-	-	0

9.5.4 Imphal West and East- skilling interventions

Hotels

- Chefs and restaurant managers
- Hotel management skills
- Quality assurance awareness
- Crisis management
- Multi-lingual and culturally sensitive
- Ability to follow set standards
- Transactions management (debit/credit card, etc.)
- Computer skills
- Professionalism and etiquette

IT, Call Centre

- Marketing and business generation
- Developing new business areas based on local competencies such as arts, sports
- Improved spoken and written English
- Multi-lingual communication
- Assertiveness and sales skills
- Web technology for animation, mathematics and programming for gaming, 'midi' for music, etc.

Sports trainers & auto mechanics

- To run various disciplines in sports academy
- Automobile training to repair cars and other vehicles

TABLE 49:SKILL LEVEL WISE HUMAN RESOURCE REQUIREMENT IN IMPHAL WEST

Incremental 2011-2021													
Sectors	Hand loom	Handicrafts	Horticulture	Food processing	Hotels	IT/ITES	Healthcare	Education	Motor Repair	Border trade	Beauty culture	Construction	Forest based
Minimal education	1,278	12,753	-	1,412	31	315	480	-	1,519	-	47	4,397	-
Skill Category Level 2	396	3,953	-	438	9	306	466	-	542	-	45	2,494	-
Skill Category Level 1	175	1,746	-	193	5	502	418	801	271	-	74	1,432	-
Specialised skills	19	186	-	21	0	11	14	8	24	-	2	84	-
Incremental Phase-I: 2011-2016													
Sectors	Hand loom	Handicrafts	Horticulture	Food processing	Hotels	IT/ITES	Healthcare	Education	Motor Repair	Border trade	Beauty culture	Construction	Forest based
Minimal education	-	5,906	-	420	14	145	240	-	730	-	20	1,923	-
Skill Category Level 2	-	1,831	-	130	4	141	233	-	249	-	20	1,091	-
Skill Category Level 1	-	777	-	55	2	230	207	401	136	-	32	625	-
Specialised skills	-	116	-	8	0	7	9	4	15	-	1	49	-
Incremental Phase-II: 2017-2021													
Sectors	Hand loom	Handicrafts	Horticulture	Food processing	Hotels	IT/ITES	Healthcare	Education	Motor Repair	Border trade	Beauty culture	Construction	Forest based
Minimal education	1,278	6,847	-	992	17	170	240	-	789	-	26	2,474	-
Skill Category Level 2	396	2,122	-	307	5	165	233	-	281	-	25	1,403	-
Skill Category Level 1	175	937	-	136	3	270	209	401	141	-	42	806	-
Specialised skills	19	100	-	14	0	6	7	4	12	-	1	47	-

TABLE 50: SKILL LEVEL WISE HUMAN RESOURCE REQUIREMENT IN IMPHALEAST

Incremental 2011-2021													
Sectors	Hand loom	Handicrafts	Horticulture	Food processing	Hotels	IT/ITES	Healthcare	Education	Motor Repair	Border trade	Beauty culture	Construction	Forest based
Minimal education	1,826	12,753	-	-	47	315	480	-	934	-	9	-	-
Skill Category Level 2	566	3,953	-	-	14	306	466	-	333	-	9	-	-
Skill Category Level 1	250	1,746	-	-	8	502	418	756	167	-	15	-	-
Specialised skills	250	1,746	-	-	8	502	418	756	167	-	15	-	-
Incremental Phase-I: 2011-2016													
Sectors	Hand loom	Handicrafts	Horticulture	Food processing	Hotels	IT/ITES	Healthcare	Education	Motor Repair	Border trade	Beauty culture	Construction	Forest based
Minimal education	-	5,906	-	-	21	145	240	-	500	-	4	-	-
Skill Category Level 2	-	1,831	-	-	6	141	233	-	178	-	4	-	-
Skill Category Level 1	-	809	-	-	4	231	209	378	89	-	6	-	-
Specialised skills	-	809	-	-	4	231	209	378	89	-	6	-	-
Incremental Phase-II: 2017-2021													
Sectors	Hand loom	Handicrafts	Horticulture	Food processing	Hotels	IT/ITES	Healthcare	Education	Motor Repair	Border trade	Beauty culture	Construction	Forest based
Minimal education	1,826	6,847	-	-	26	170	240	-	434	-	5	-	-
Skill Category Level 2	566	2,122	-	-	8	165	233	-	155	-	5	-	-
Skill Category Level 1	250	937	-	-	4	270	209	378	77	-	8	-	-
Specialised skills	250	937	-	-	4	270	209	378	77	-	8	-	-

9.5.5 Senapati - skilling interventions

Horticulture

- Knowledge of soil, weather, scientific cultivation methods, irrigation techniques
- Multi-cropping for income throughout the year
- Certifications and produce quality labelling
- Pre-cooling and warehousing techniques
- Market knowledge
- Optimum transportation knowledge
- Contract farming

TABLE 51: SKILL LEVEL WISE HUMAN RESOURCE REQUIREMENT IN SENAPATI

Incremental 2011-2021													
Sectors	Hand loom	Handicrafts	Horticulture	Food processing	Hotels	IT/ITES	Healthcare	Education	Motor Repair	Border trade	Beauty culture	Construction	Forest based
Minimal education	1,496	-	2,459	-	-	-	-	-	58	-	-	782	-
Skill Category Level 2	464	-	646	-	-	-	-	-	21	-	-	443	-
Skill Category Level 1	205	-	418	-	-	-	-	583	10	-	-	255	-
Specialised skills	22	-	36	-	-	-	-	6	1	-	-	15	-
Incremental Phase-I: 2011-2016													
Sectors	Hand loom	Handicrafts	Horticulture	Food processing	Hotels	IT/ITES	Healthcare	Education	Motor Repair	Border trade	Beauty culture	Construction	Forest based
Minimal education	-	-	799	-	-	-	-	-	45	-	-	342	-
Skill Category Level 2	-	-	210	-	-	-	-	-	16	-	-	194	-
Skill Category Level 1	-	-	136	-	-	-	-	292	8	-	-	111	-
Specialised skills	-	-	12	-	-	-	-	3	1	-	-	7	-
Incremental Phase-II: 2017-2021													
Sectors	Hand loom	Handicrafts	Horticulture	Food processing	Hotels	IT/ITES	Healthcare	Education	Motor Repair	Border trade	Beauty culture	Construction	Forest based
Minimal education	1,496	-	1,660	-	-	-	-	-	13	-	-	440	-
Skill Category Level 2	464	-	436	-	-	-	-	-	5	-	-	249	-
Skill Category Level 1	205	-	282	-	-	-	-	292	2	-	-	143	-
Specialised skills	22	-	24	-	-	-	-	3	0	-	-	8	-

9.5.6 Tamenglong- skilling interventions

Horticulture

- Knowledge of soil, weather, scientific cultivation methods, irrigation techniques
- Multi-cropping for income throughout the year
- Certifications and produce quality labelling
- Pre-cooling and warehousing techniques
- Market knowledge
- Optimum transportation knowledge
- Contract farming

Hospitality (Orange festival)

- Chefs and restaurant managers
- Hotel management skills
- Quality assurance awareness
- Crisis management
- Multi-lingual and culturally sensitive
- Ability to follow set standards
- Transactions management (debit/credit card, etc.)
- Computer skills
- Professionalism and etiquette

TABLE 52: SKILL LEVEL WISE HUMAN RESOURCE REQUIREMENT IN TAMENGLONG

Incremental 2011-2021													
Sectors	Hand loom	Handicrafts	Horticulture	Food processing	Hotels	IT/ITES	Healthcare	Education	Motor Repair	Border trade	Beauty culture	Construction	Forest based
Minimal education	1,203	-	6,148	-	21	-	-	-	58	-	-	586	-
Skill Category Level 2	373	-	1,616	-	6	-	-	-	21	-	-	333	-
Skill Category Level 1	165	-	1,045	-	3	-	-	236	10	-	-	191	-
Specialised skills	18	-	89	-	0	-	-	2	1	-	-	11	-
Incremental Phase-I: 2011-2016													
Sectors	Hand loom	Handicrafts	Horticulture	Food processing	Hotels	IT/ITES	Healthcare	Education	Motor Repair	Border trade	Beauty culture	Construction	Forest based
Minimal education	-	-	1,997	-	9	-	-	-	45	-	-	256	-
Skill Category Level 2	-	-	525	-	3	-	-	-	16	-	-	145	-
Skill Category Level 1	-	-	339	-	2	-	-	118	8	-	-	84	-
Specialised skills	-	-	29	-	0	-	-	1	1	-	-	5	-
Incremental Phase-II: 2017-2021													
Sectors	Hand loom	Handicrafts	Horticulture	Food processing	Hotels	IT/ITES	Healthcare	Education	Motor Repair	Border trade	Beauty culture	Construction	Forest based
Minimal education	1,203	-	4,151	-	11	-	-	-	13	-	-	330	-
Skill Category Level 2	373	-	1,091	-	3	-	-	-	5	-	-	187	-
Skill Category Level 1	165	-	705	-	2	-	-	118	2	-	-	107	-
Specialised skills	18	-	60	-	0	-	-	1	0	-	-	6	-

9.5.7 Thoubal - skilling interventions

Horticulture

- Knowledge of soil, weather, scientific cultivation, irrigation techniques
- Multi-cropping for income throughout the year
- Certifications and produce quality labelling
- Pre-cooling and warehousing techniques
- Market knowledge
- Optimum transportation knowledge
- Contract farming

Embroidery

- Quality standards and certifications
- Assessment of competitive environment and sample collection
- Innovation in design and productivity enhancement through use of computerised embroidery machines
- Assertive communication, language and negotiation skills

IT, Call Centre

- Marketing and business generation
- Developing new business areas based on local competencies such as arts, sports
- Improved spoken and written English
- Multi-lingual communication
- Assertiveness and sales skills
- Web technology for animation, mathematics and programming for gaming, 'midi' for music, etc.

TABLE 53: SKILL LEVEL WISE HUMAN RESOURCE REQUIREMENT IN THOUBAL

Incremental 2011-2021													
Sectors	Hand loom	Handicrafts	Horticulture	Food processing	Hotels	IT/ITES	Healthcare	Education	Motor Repair	Border trade	Beauty culture	Construction	Forest based
Minimal education	1,279	54,200	3,074	-	-	42	240	-	58	-	9	-	-
Skill Category Level 2	396	16,799	808	-	-	40	233	-	21	-	9	-	-
Skill Category Level 1	175	7,421	522	-	-	66	209	551	10	-	15	-	-
Specialised skills	19	792	44	-	-	1	7	6	1	-	0	-	-
Incremental Phase-I: 2011-2016													
Sectors	Hand loom	Handicrafts	Horticulture	Food processing	Hotels	IT/ITES	Healthcare	Education	Motor Repair	Border trade	Beauty culture	Construction	Forest based
Minimal education	-	25,101	999	-	-	27	120	-	45	-	4	-	-
Skill Category Level 2	-	7,780	262	-	-	26	117	-	16	-	4	-	-
Skill Category Level 1	-	3,437	170	-	-	43	105	275	8	-	6	-	-
Specialised skills	-	367	14	-	-	1	3	3	1	-	0	-	-
Incremental Phase-II: 2017-2021													
Sectors	Hand loom	Handicrafts	Horticulture	Food processing	Hotels	IT/ITES	Healthcare	Education	Motor Repair	Border trade	Beauty culture	Construction	Forest based
Minimal education	1,279	29,099	2,075	-	-	15	120	-	13	-	5	-	-
Skill Category Level 2	396	9,019	545	-	-	14	117	-	5	-	5	-	-
Skill Category Level 1	175	3,984	353	-	-	24	105	275	2	-	8	-	-
Specialised skills	19	425	30	-	-	1	3	3	0	-	0	-	-

9.5.8 Ukhrul - skilling interventions

Handloom

- Marketing and business generation
- Developing new business areas based on local competencies such as arts, sports
- Improved spoken and written English
- Multi-lingual communication
- Assertiveness and sales skills
- Web technology for animation, mathematics and programming for gaming, ‘midi’ for music, etc.

TABLE 54: SKILL LEVEL WISE HUMAN RESOURCE REQUIREMENT IN UKHRUL

Incremental 2011-2021													
Sectors	Hand loom	Handicrafts	Horticulture	Food processing	Hotels	IT/ITES	Healthcare	Education	Motor Repair	Border trade	Beauty culture	Construction	Forest based
Minimal education	819	-	-	-	-	-	-	-	58	-	-	-	-
Skill Category Level 2	254	-	-	-	-	-	-	-	21	-	-	-	-
Skill Category Level 1	112	-	-	-	-	-	-	353	10	-	-	-	-
Specialised skills	12	-	-	-	-	-	-	4	1	-	-	-	-
Incremental Phase-I: 2011-2016													
Sectors	Hand loom	Handicrafts	Horticulture	Food processing	Hotels	IT/ITES	Healthcare	Education	Motor Repair	Border trade	Beauty culture	Construction	Forest based
Minimal education	-	-	-	-	-	-	-	-	45	-	-	-	-
Skill Category Level 2	-	-	-	-	-	-	-	-	16	-	-	-	-
Skill Category Level 1	-	-	-	-	-	-	-	176	8	-	-	-	-
Specialised skills	-	-	-	-	-	-	-	2	1	-	-	-	-
Incremental Phase-II: 2017-2021													
Sectors	Hand loom	Handicrafts	Horticulture	Food processing	Hotels	IT/ITES	Healthcare	Education	Motor Repair	Border trade	Beauty culture	Construction	Forest based
Minimal education	819	-	-	-	-	-	-	-	13	-	-	-	-
Skill Category Level 2	254	-	-	-	-	-	-	-	5	-	-	-	-
Skill Category Level 1	112	-	-	-	-	-	-	176	2	-	-	-	-
Specialised skills	12	-	-	-	-	-	-	2	0	-	-	-	-

9.5 Key interventions for Manipur

- Interventions for Manipur have been arrived at keeping in mind that of all North Eastern States, Manipuris are among the least inclined to migrate. However, excess supply of educated or trained persons over what can be accommodated from demand generated within the State in the next 10 years, indicates that some amount of skilling for migration will be essential.
- As the economy of Manipur grows and new areas of employment develop, this migrated skill base can be leveraged to attract them back and make a contribution to the State's economy.
- There is an expected excess demand in the skill level 1. Additional capacity would be required to be created for about 250 persons per year to match skill training with industry requirements.
- Areas of capacity creation for vocational training include: weaving, artisans, farm-extension services, products distribution, packaging, chefs, call centre-customer service, paramedics, mechanics, border-trade, beauty and wellness, mason, welding, machine operations, logistic, electric works, crafts, computer operations, food technology, and computer/ laptop/ cell-phone repairs.
- Combining skill training with entrepreneurial skills would be essential, depending on the level of training imparted. Manipur lacks entrepreneurial activity in any activity that is not related to handloom and handicraft. However, there are signs of such activity coming up, especially, in the food, hospitality, and healthcare sectors.
- Specialist skill development institutes for sports and arts would help use the traditional skills of local youth.
- Between 2011 and 2021, around 81,000 persons will be available for training for skills that relate to demand outside the State. Key opportunities include retail, hospitality, IT, fashion design, nursing, cooks (overseas), beauticians, call-centre operator, etc.
- Re-skilling for livelihood opportunities in weaving, fisheries and apiculture would also be required for over 6 lakh persons.

Annexure

1. Methodology used for Demand projections

The following methodology has been adopted for making demand side projections of human resources:

- Identification of key economic activities in each district.
- Estimation of current employment numbers in each district, based on information available from Government publications and IMaCS primary survey.
- Forecasting of future employment requirements, using different assumptions (explained in the slide on assumptions) for each industry.
- Different assumptions have been used because of differences in nature, demand and growth potential, factor endowments, commercialisation status, policy thrust, past growth trends, past and expected investments, employment pattern and opportunities for migration of all economic activities.
- Forecasts have been done for all existing and potential industries identified by us. District wise distribution of employment in 2021 is assumed to remain same as it was in 2011.

2. List of Abbreviations

List of Abbreviations	
BRO	Border Roads Organisation
BSNL	Bharat Sanchar Nigam Limited
CAGR	Compound Annual Growth Rate
DDP	District Domestic Product
DoNER	Ministry of Development of North Eastern Region
GDP	Gross Domestic Product
GSDP	Gross State Domestic Product
HEP	Hydro-electric Power
HRD	Human Resource Development
IT	Information Technology
ITI	Industrial Training Institute
mn	Million
MU	Million Units
NEC	North Eastern Council
NEDFi	North Eastern Development Finance Corporation Limited
NER	North Eastern Region
NES	North Eastern States
NGO	Non-Governmental Organisation
NIT	National Institute of Technology
No.	Number
NSDC	National Skill Development Corporation
O&M	Operation and Maintenance
PPP	Public Private Partnership
PWD	Public Works Department
SHG	Self Help Group
SIDO	Small Industries Development Organisation

3. List of people met in Manipur

Person Met	Designation	Organisation	Organisation Type	District
D.S. Poonia	Chief Secretary	Secretariat	State Government	State
Jacintha Lazarus	Deputy Commissioner, Churachandpur District	District HQ	State Government	Churachandpur
R. K. Dinesh	Deputy Commissioner, Thoubal District	District HQ	State Government	Thoubal
T. Sitlhou	Deputy Commissioner, Bishenpur District	District HQ	State Government	Bishnupur
K. Lakshmi Kumar	Deputy Commissioner, Imphal East District	District HQ	State Government	Imphal East
T.S. Arun Kumar	General Manager, District Industries Centre, Imphal East	District	State Government	Imphal East
L. Praphullo Singh	Assistant Director – Industries (Design)	District	State Government	Imphal East
H. Vandana	Cluster Development Executive	BasikhongKitnapanung cluster	SHG	Imphal East
H. Anil	Vice President (STPI, Imphal West)	X-treme Wave	Entrepreneur	Imphal West
ThennemZou	President (KamdouVeng village, Churachandpur)		SHG	Churachandpur
K. Vungzamawi	Secretary (Churachandpur district)	Zapada	NGO	Churachandpur
	DGM	NABARD	Government	Churachandpur
D. Pudaite			Entrepreneur	Churachandpur
Manmasi Men SHG		Beekeeping	SHG	Churachandpur
Merigold		Dry flowers	Award winning SHG	Churachandpur
	Generale Manager (Bishenpur)	DIC	Government	Bishnupur
Holkhothamg Mate	Secretary (Churachandpur district)	Ideal Handloom & Handicrafts Cooperative Society	SHG	Churachandpur
Gin Gangte	Grower (Churachandpur district)	Farmer	Private	Churachandpur
A Kharsi-Singh	Chief Conservator of Forests	Forest Department	Government	State
R K (Ongghi) Purnima Devi	Proprietor (Wangkhei, Imphal)	Ladies Handloom House	Private	Imphal West
	Head (Churachandpur district)		Private	Churachandpur
	Group of brick makers (Churachandpur)		Private	Churachandpur
S. Ibeni Deb	Head trainer (Thoubal district)	Social Economic Development SHG	SHG	Thoubal
	Lead weaver (Thoubal district)	TangkhaManingKh en	SHG	Thoubal

Person Met	Designation	Organisation	Organisation Type	District
	Lead weaver (Thoubal district)	SangaiyumphomNungphouMathake	SHG	Thoubal
Sunibala Devi	Head (Thoubal district)	NingolMouTengbang	SHG	Thoubal
	Head (Thoubal district)	Guide Women	SHG	Thoubal
Indira Oinam	Head (Thoubal district)	Women's Income Generation Centre (WIGC)	NGO-award winning	Thoubal
Mr.Biken	Counsellor (Imphal)	Centre for Mental Hygiene	NGO	Imphal West
	Proprietor (Imphal West)	S. P. Embroidery	Entrepreneur (National MSME award winner, ISO certified, credit rated)	Imphal West
Mr. Imo Thiyam	Project Director (Imphal)	CIPET	Technical Institution	Imphal
Dr.Sarat Chandra	Administrative Head (Imphal)	NIT	Technical Institution	Imphal
Ms.Kulakarani	Joint Director	Planning Department	State Government	State
Meira Foods	Proprietor (Imphal East)	Action for Community Transformation	Cooperative-Entrepreneur	Imphal East
O Nabakishore Singh	Commissoner	Commerce & Industries Department	State Government	State
S Joykumar Singh	Managing Director	Manipur Industrial Develoment Corporation Limited	Stae Government	State
Sanatkumar Singh, Kirti Singh	Chemist	Food Park	State Government	State
L Achouba, L Modon		Fisheries department	State Government	Bishnupur
Anil Singh		IT Department	State Government	State
Noren Sharma	Proprietor	Stone crushing unit	Private	Imphal/Senapati border
Dr. W Gyaneshor Singh	Dean	Regional Institute of Medical Sciences (RIMS)	NER	Imphal
Dr.SinamSekhorjit Singh	Director	RIMS	NER	Imphal
Dr. S Bilashini Devi	Doctor	RIMS	NER	Imphal
M Lokendro Singh	Chief Engineer	Public Works	State	Imphal

Person Met	Designation	Organisation	Organisation Type	District
		Department (PWD)	Government	
Munindra Singh	Director	State Planning	State Government	Imphal
Tombi Devi, S. Chaotombi Devi, K Vijya Devi	Cluster Development Executive, Chairman, Secretary	LamdingCherapur Cluster	SHG	Thoubal
L Modhu Singh, Y Lukhoi Singh, M M Singh, N I Devi	CDE, Designer, President, Secretary	Southern Handloom Weavers Development Federation	Handloom Society (Consortium)	Thoubal
Dr. U Chaoba and others	Professor	Horticulture Department, Central Agricultural University	Central University	Imphal
H Nandakumar Sharma	Vice Chancellor	Manipur University	State University	Imphal
Y Mani	Proprietor	Auto Mechanic	Private	Imphal
Dr.Dhabali Singh	Proprietor	Classic Hotel	Private	Imphal
T Amuba Singh	Senior Finance and Accounts Officer	NHPC	Government	
T Shyam Kumar	Manager Civil	NHPC	Government	

4. Manipur – List of Handicrafts Clusters

Location	District	Product	Details
Loktak area, Utlou village	Bishnupur	Yengthou Mat	Mattresses
	Churachandpur	Cane and Bamboo craft	Baskets, mats, Furniture like Murah, Chair, Hat, Candle stand, Tray, Table lamps etc.
	Imphal	Cane and Bamboo craft	Baskets, mats, Furniture like Murah, Chair, Hat, Candle stand, Tray, Table lamps etc.
Chairel Nongpok Sekmai, Andro	Imphal	Coiled Pottery	Flower pot, smoking pipe, pressure cooker, water filter, various type of plate, agarbati stand, pot
	Imphal	Jewellery	Traditional metal jewellery
Aheiban Leikai, Imphal	Imphal	Bell Metal	Sengabetel container, Krishna kanti dish, senga
Keirao	Imphal	Stone Carving	Panels, memorial stones and idols
	Imphal	Hand Embroidery	Phanek Mapal Naiba (Longi), Pillow cover, bed sheets, handkerchief, table cloth, T.V. and Radio Cover, Wall hangings and decorative items
	Imphal	Carpet	Traditional Blanket, carpets
	Imphal	Applique Work	Ritual dresses
	Imphal	Handblock printing	Traditional dress material, dhoti and chadar
	Imphal	Toys & Dolls	Typical dancing design of dolls
Kongba bazar area	Imphal East	Kauna Grass reed	Mat, Cushion square, Cushion round, Murah, wall decorative items
Konthoujam village	Imphal West	Yengthou Mat	Mattresses
Heirangoitbong, Khongnang Pheidekpi	Imphal West	Brass and bell metal	Utensils, musical instruments, ritual objects
	Tamenglong	Cane and Bamboo craft	Baskets, mats, Furniture like Murah, Chair, Hat, Candle stand, Tray, Table lamps etc.
Kakching	Thoubal	Cane and Bamboo craft	Baskets, mats, Furniture like Murah, Chair, Hat, Candle stand, Tray, Table lamps etc.
Khangabok village, Yairipok area	Thoubal	Kauna Grass reed	Mat, Cushion square, Cushion round, Murah, wall decorative items
Thongjao	Thoubal	Coiled Pottery	Flower pot, smoking pipe, pressure cooker, water filter, various type of plate, agarbati stand, pot
Longpi village	Ukhrul	Coiled Pottery	Flower pot, smoking pipe, pressure cooker, water filter, various type of plate, agarbati stand, pot
Indpur		Cane & Bamboo Craft	
Heirangkhoithong		Bell Metal	Sengabetel coantainer, Krishna kanti dish, senga

5. Training Capacity of Vocational Education in Manipur

Location	District	Product	Details
Loktak area, Utlou village	Bishnupur	Yengthou Mat	Mattresses
	Churachandpur	Cane and Bamboo craft	Baskets, mats, Furniture like Murah, Chair, Hat, Candle stand, Tray, Table lamps etc.
	Imphal	Cane and Bamboo craft	Baskets, mats, Furniture like Murah, Chair, Hat, Candle stand, Tray, Table lamps etc.
Chairel Nongpok Sekmai, Andro	Imphal	Coiled Pottery	Flower pot, smoking pipe, pressure cooker, water filter, various type of plate, agarbati stand, pot
	Imphal	Jewellery	Traditional metal jewellery
Aheiban Leikai, Imphal	Imphal	Bell Metal	Sengabetel container, Krishna kanti dish, senga
Keirao	Imphal	Stone Carving	Panels, memorial stones and idols
	Imphal	Hand Embroidery	Phanek Mapal Naiba (Longi), Pillow cover, bed sheets, handkerchief, table cloth, T.V. and Radio Cover, Wall hangings and decorative items
	Imphal	Carpet	Traditional Blanket, carpets
	Imphal	Applique Work	Ritual dresses
	Imphal	Handblock printing	Traditional dress material, dhoti and chadar
	Imphal	Toys & Dolls	Typical dancing design of dolls
Kongba bazar area	Imphal East	Kauna Grass reed	Mat, Cushion square, Cushion round, Murah, wall decorative items
Konthoujam village	Imphal West	Yengthou Mat	Mattresses
Heirangoitbong, Khongnang Pheidekpi	Imphal West	Brass and bell metal	Utensils, musical instruments, ritual objects
	Tamenglong	Cane and Bamboo craft	Baskets, mats, Furniture like Murah, Chair, Hat, Candle stand, Tray, Table lamps etc.
Kakching	Thoubal	Cane and Bamboo craft	Baskets, mats, Furniture like Murah, Chair, Hat, Candle stand, Tray, Table lamps etc.
Khangabok village, Yairipok area	Thoubal	Kauna Grass reed	Mat, Cushion square, Cushion round, Murah, wall decorative items
Thongjao	Thoubal	Coiled Pottery	Flower pot, smoking pipe, pressure cooker, water filter, various type of plate, agarbati stand, pot
Longpi village	Ukhrul	Coiled Pottery	Flower pot, smoking pipe, pressure cooker, water filter, various type of plate, agarbati stand, pot
Indpur		Cane & Bamboo Craft	
Heirangkhoithong		Bell Metal	Sengabetel coantainer, Krishna kanti dish, senga

About ICRA Management Consulting Services Limited

IMaCS - An introduction

ICRA Management Consulting Services Limited (IMaCS) is a multi-line management consulting firm headquartered in India. It has an established track record of 17 years in management and development consulting across various sectors and countries. IMaCS has completed more than 1,200 consulting assignments with about 600 clients and has worked in over 40 countries across the globe. IMaCS is a wholly-owned subsidiary of ICRA Limited (ICRA), one of India's leading credit rating agencies. IMaCS operated as an independent division of ICRA till March 2005¹, when it was de-merged from ICRA and became a standalone company in its present form.

Through the process of carrying out several assignments over the past 17 years, IMaCS has accumulated considerable analytical and consulting expertise, backed by the following organisational capabilities:

- An extensive and organised database on several sectors.
- Knowledge of key factors of success in different projects and program.
- An ability to research emerging global trends, both in specific countries as well as in different sectors, based on primary and secondary data.
- Performance benchmarking
- Quantitative and financial modelling
- Ability to identify the various types of risks and suggest appropriate strategies to mitigate the same
- Ability to work in different geographies on its own and through affiliate partners

¹ Under the name "ICRA Advisory Services"



Regd. Office D-4, Clarion Collection, (Qutab Hotel)
Shaheed Jeet Singh Marg, New Delhi 11 0 016 India
nsdc@nsdcindia.org • Tel 011 46 56 0412 - 16 • Fax 011 4656 0417
www.nsdcindia.org

Design: www.fulki.co.in