

NORTH-EASTERN STATES OF INDIA

EDUCATION MARKET ANALYSIS

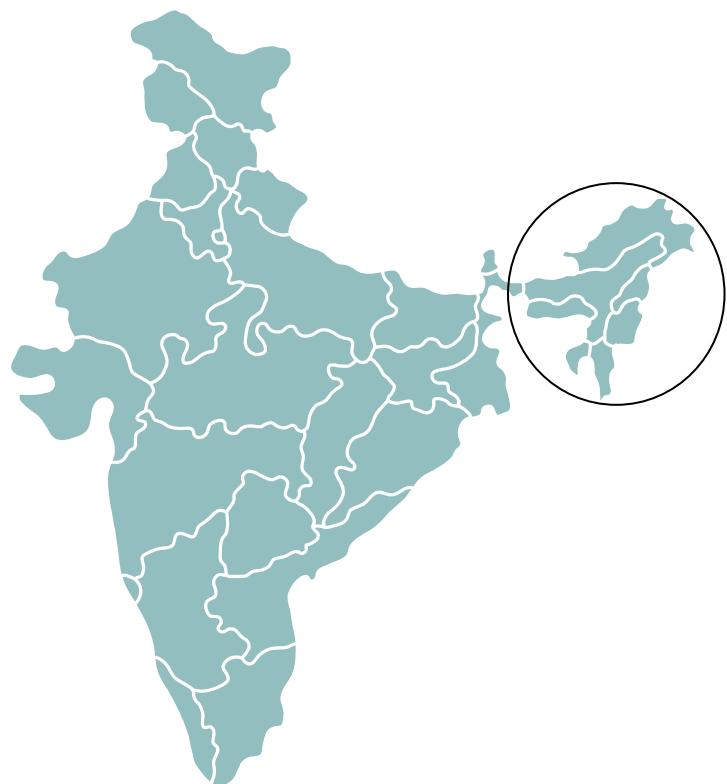
- The North Eastern region of India, comprising **Assam, Arunachal Pradesh, Manipur, Meghalaya, Mizoram, Nagaland, and Tripura**, remains one of the country's most distinctive yet **underrepresented education markets**.

Despite decades of geographic isolation and infrastructure gaps, the region has witnessed steady growth in HEIs over the past two decades.

- Marked by **high literacy, strong English-medium schooling, and rising aspirations**, the North East presents striking opportunities. Together, the seven states account for over 1.2 million higher-education enrolments, with Assam as the major institutional base. **The NEP 2020's regional inclusion framework** and the

PM-DEVINE programme have earmarked special education infrastructure funding for the North-Eastern region. However, challenges such as limited vocational programs, weak research infrastructure, and accessibility continue to constrain higher education outcomes.

Thus, this report aims to provide an in-depth analysis of the North Eastern higher education landscape, examining demographic patterns, institutional capacity, outbound mobility, and the agent-counselor ecosystem. It aims to offer actionable insights for international universities and education consultancies, outlining how strategic engagement, partnerships, and outreach can unlock the region's growing pool of literate, English-speaking, and globally aspirational students.



Demographic Profile

- Population:** ~45 million, projected ~ 51 million (2024-25). Assam accounts for around 67% of the total population. Thus, most enrolments, universities, and consultancy activities are concentrated there.
- Literacy Rate:** Average literacy – 78.5%. Mizoram (98.2%), Meghalaya (94.2%), and Manipur (92%) are among India's highest-literacy states.
- Youth Demography:** Over 30% of the population is aged 15 - 29, indicating a strong base for higher education enrollment and outbound mobility.
- Urban-Rural Distribution:** Predominantly rural; although urban centers like Guwahati, Shillong, Imphal, and Agartala serve as educational and counseling hubs.

Geo-Socio-Cultural Landscape

- **Geography:** Approximately 65% of the terrain is hilly or forested (national average: 22%); Reserved Forests & Protected Areas, especially in Arunachal Pradesh (79.6%), Mizoram (84.5%), and Meghalaya (76.3%), limit accessibility and drive high interstate mobility.
 - The jurisdiction of Autonomous District Councils (Sixth Schedule) and Inner Line Permit regimes in states like Arunachal Pradesh, Nagaland, Mizoram, and Manipur limits private campus expansion and external investment.
 - **Ethnic & Cultural Composition:** Home to approximately 135 Scheduled Tribe groups out of a total of around 705 in India. >65% of the population in Mizoram, Meghalaya & Nagaland is classified as Scheduled Tribes

School ecosystem

This region hosts a dense but uneven school network. In the Primary and Higher secondary education sector, there are ~ 90K schools, 70–75% government-run, and the rest are private, missionary, or community-managed.

- **Enrolment Trends:**
 - **Total Enrolment:** ~55 lakh students (2021–22) across primary to higher secondary levels.
 - Govt schools dominate in rural and hilly districts, private and missionary schools cluster in urban centers such as Guwahati, Shillong, Aizawl, Imphal, and Agartala.
 - Scattered settlements, rough terrain, and limited connectivity = small school sizes and multi-grade classrooms.
 - The transition rate from secondary to higher secondary education stands at 83% (UDISE+ 2022), with English as the medium of instruction in over 70% of private and missionary schools, creating a strong foundation for the international education campaign.

Missionary and Church-Affiliated Ecosystem

- They form a major component of the schooling ecosystem, especially in Mizoram, Meghalaya, and Nagaland.
- These networks **contribute to literacy rates exceeding 90%** and **female participation of over 85%** in most districts.
- Support the students with higher baseline English exposure.
- **Examples:** Mizoram Presbyterian Church Synod runs 73 schools (hosts ~35K students), the Baptist Church of Mizoram operates 4 high schools, 6 middle schools, and 24 primary schools, etc.
- Collectively, Presbyterian, Baptist, and Catholic education societies manage over 400 English-medium schools across NE.

Curriculum & Boards

- **State Boards:**
 - Each state maintains its own board (Example – Mizoram, Manipur, Meghalaya Boards), covering 70% of the total schools.
- **CBSE & ICSE:**
 - CBSE schools are expanding, particularly in Assam (now hosts 300+), Tripura, Nagaland, and Meghalaya.
 - Concentrated in urban hubs – Guwahati, Shillong, Aizawl, Imphal, and Agartala. Serve English-proficient, globally aspirational families.
 - CBSE-affiliated enrolments have grown by 22% (2016–2022)
 - Examples: St. Edmund's (Shillong), Don Bosco (multi-state network), Little Flower (Imphal), St. Paul's (Agartala), Royal Global (Guwahati).
- **IB or IGCSE:**
 - Less than 10 schools with an international curriculum operate across the region, primarily Royal Global (Cambridge) and Pine Mount International (Shillong).

State-Wise Distribution of Schools in North East

State	Total	Primary	Upper Primary	Secondary	Higher Secondary
Arunachal Pradesh	3,603	1,847	1,273	319	164
Assam	60,859	40,482	10,672	7,290	2,415
Manipur	4,617	2,422	966	958	271
Meghalaya	14,600	9,223	3,529	1,462	386
Mizoram	3,911	1,481	1,519	706	205
Nagaland	2,718	1,157	787	576	198
Tripura	4,929	2,522	1,226	702	479
Total — NE Region	95,237	59,134	19,972	12,013	4,118

Higher Education Institutions & Enrollment

- Hosts **70 universities and 1,000+ colleges** with a mix of central, state, and private institutions.
 - **Central universities play an outsized role.** North-Eastern Hill University, Manipur University, Mizoram University, and Nagaland University collectively enroll over 1.3 lakh students.
 - Hosts several nationally distinguished institutions, such as **IIT Guwahati** (ranked 7th overall and 8th in Engineering in NIRF 2024), Tezpur University (top 50 in NIRF), and NIPER Guwahati. These institutions serve as R&D anchors for biotech, pharmaceuticals, & engineering.
 - IIT Guwahati's collaborations with Japan's Shizuoka University and the Australia-India Water Centre mark a shift towards transnational research partnerships.
 - Together, these hubs are improving regional research visibility and student aspiration.
- **Private participation remains limited**, but state incentives and the RUSA 2.0 programme are encouraging new private and autonomous colleges.
 - Assam dominates the regional higher-education network. 550+ colleges and 20+ universities, including 2 central universities, Tezpur University and Assam University, and prominent private institutions such as Assam Down Town University and Royal Global University.
- **Total enrolment:** 12.02 lakh (2021–22)
- **Gross Enrolment Ratio (GER):** 28.4%, driven by higher female participation in several states.
- **Discipline-wise enrolments:** Arts/Humanities dominates (34 %), followed by professional disciplines like Medicine, Education, and Management forming the largest outbound-ready segment due to seat scarcity in local HEIs.

State	Private Colleges	Govt Colleges	Total Colleges
Arunachal Pradesh	18	23	41
Assam	108	452	560
Manipur	44	59	103
Meghalaya	35	27	62
Mizoram	8	31	39
Nagaland	47	20	67
Tripura	10	43	53
NE Region (Total)	274	670	944

Major Institutes in NER

Assam Skill University (ASU), Mangaldoi: ASU is the first Govt. Skills University of NER is currently being set up in a sprawling campus in Mangaldoi, Assam.

Indian Institute of Entrepreneurship (IIE), Guwahati: Offers training and education programs in entrepreneurship, skill development, and small business management.

North East Skill Centre (NESC): Established under Assam Skill Development Mission jointly with IEE-Singapore, NESC is one of its high-end state-of-the-art Skill Training Centres, conducting training in Tourism & Hospitality, Beauty & Wellness, and Retail sector.

North Eastern Regional Institute of Water and Land Management (NERIWALM), Tezpur: Courses in water management, land management, and environmental science, with a focus on skill development and research.

National Skill Training Institute (NSTI), Guwahati: Offers vocational training programs in various sectors, including electronics, computer hardware, and automobile.

Don Bosco Institute of Management (DIM), Guwahati: Courses offered in Management, Hospitality, and Engineering, with a focus on skill development and practical training.

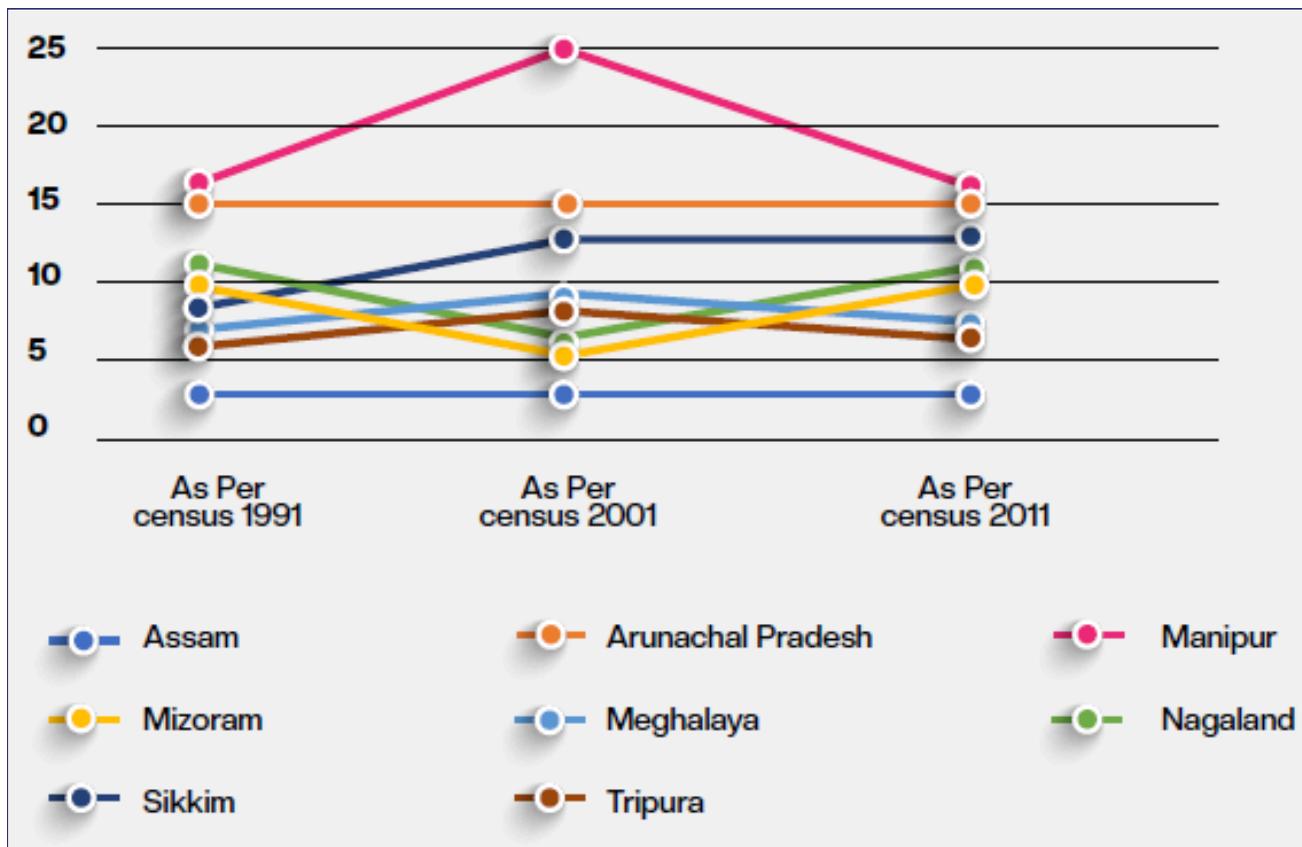
Student Mobility Trends

Major institutions like Gauhati University, Tezpur University, and Manipur University etc., produce the bulk of graduates who either

- (a) Move to Indian metros (Delhi, Bengaluru, Pune, Kolkata) for professional education or,
- (b) A smaller proportion pursues international education.

The unemployment rate in the North-East is very high and has gradually become severe. Hence, employment is the main reason for migration.

Destinations (within India) for North-East Students



Nearly **3/4th of the North Eastern students** migrate to mainland India. 65 % of North-East students migrated to ten mainland States/UTs according to the 2011 Census.

- **Preferred Destinations:**

- Karnataka (19.1%) is the best-preferred place of destination for education.
- Maharashtra (10.1 %), Delhi (9.3 %), West Bengal (5.6 %), Tamil Nadu (5.3 %), Uttar Pradesh (5.2 %), Andhra Pradesh (3.9 %), Uttarakhand (3 %), Himachal Pradesh (2.1 %), & Rajasthan (1.7 %).
- Assam, Mizoram, Arunachal Pradesh, and Nagaland have the highest outbound ratios.

Destinations (outside India) for North-East Students

- Very few students from the North East pursue their higher education abroad. However, over the last decade, a tremendous growth in the number of students wishing to study abroad has been witnessed.
- Major data gaps are present with respect to outbound student mobility from the North East.
- This market is brand-conscious and scholarship-driven, with a keen eye on opportunities in **traditional destinations** like the UK, USA, Canada, and Australia.

Emerging Outbound Trends

- Rising interest in **Germany & Ireland** due to tuition-free and low-cost public HEIs.
- **Japan** is emerging through the “Study in Japan Global Network Project (South Asia)” – IITG and Nagaland University are involved.
- **Australia’s** New Colombo Plan & Deakin’s India strategy expanding scholarships for NE students.

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

Course Preferences

- Predominantly lean towards postgraduate aspirations. Recently, there has been a burgeoning interest in undergraduate programs.
 - **STEM (Engineering, Computer Science, Data Science):** High demand for engineering, as many students take JEE exams and perceive high ROI.
 - **Medicine & Allied Health (MBBS, Nursing, Pharmacy, Public Health):** Demand is high-to-moderate. Domestic MBBS seats are very limited; thus, look abroad to fulfill medical aspirations.
 - **Business and Management, International Relations:** Students who go abroad often prefer specialisations in these courses for career and salary prospects.
 - **Law/ Liberal Arts/ Humanities:** Liberal arts or humanities are often less chosen unless the student has very strong academic preparation or scholarship support. Career prospects + stable employment make the overall demand lower for these courses.
- Within outbound aspirants, however, STEM and Allied Health dominate due to perceived ROI, with management emerging as a secondary cluster.

Agent & Consultant Ecosystem

- The total number of education consultants across the North East exceeds 400, with new hybrid and online agencies emerging post-COVID.
- Guwahati alone hosts 150+ active counsellors, while Imphal and Shillong are developing niche consultancies linked with IELTS/TOEFL prep institutes
- However, about 90% of them are single-owner / small-scale.
- Some larger and national consultancies are present. For instance:
 - Leverage Edu has a centre in Ulubari, Guwahati.
 - IDP Education has a presence in Guwahati.
 - Canam Consultants offers study-abroad counselling in Guwahati.
 - Others include – Premier Edu, Aspire Abroad Education, Global Reach, Guwahati: Smart Study, etc.
- Consultants provide – University and course selection, visa assistance, Entrance/language test prep, Scholarship/ financial guidance, and accommodation arrangements.

Risks & Constraints

- **Inadequate Infrastructure:** Over 65% of NE colleges are urban-located (AISHE 2023). This limits accessibility in the interiors of the NE. Most outbound students are concentrated in 3-5 urban nodes (Guwahati, Shillong, Imphal, Aizawl), leading to geographically constrained recruitment bases.
- **Connectivity:** Internet connectivity, though improving under BharatNet and Digital India initiatives, remains inconsistent in Arunachal Pradesh, Nagaland, and parts of Manipur, hampering digital learning adoption.
- **Low Technical & Employability Alignment:** Only 8% of enrolments are in technical or vocational courses (vs. the national average of 18%). Thus, skill mismatch and weak vocational education create a readiness gap for university-level STEM or applied programs abroad.
- **Postgraduate enrolment averages 6%,** half the national rate. Thus, the region contributes limited postgraduate-ready talent, restricting opportunities for master's and PhD recruitment.
- **Limited Affordability & Scholarship Dependency:** Per-capita income across NE states remains 30-40% below the national average, and education loans have low penetration. Thus, students are price-sensitive and scholarship-driven.
- **Regulatory and Partnership Barriers:** The Inner Line Permit and Sixth Schedule governance frameworks restrict foreign campus setups and private partnerships.

Opportunities

Proximity to Southeast Asia: The NER states have connectivity with Southeast Asian nations and share an international border spanning over 5,562 km.

- Thus, proximity & easy access to countries like Nepal, Bhutan, Myanmar, and Bangladesh, with the potential to attract students from these countries.
- Additionally, the region boasts a rich cultural heritage that aligns with the traditions of countries like Thailand, Vietnam, and Myanmar. These factors provide an ideal opportunity to develop and promote the region's educational infrastructure.

Policy Initiatives:

- Under PM-DEVINE and NEP 2020, education accounts for 6.1% of SGDP, above the national average.
- World Bank initiatives (e.g., Assam HEDP) are modernising governance, infrastructure, and faculty training. Thus, these policy initiatives will be directly beneficial to the region's higher education market.
- Policy momentum under Act East and Study in India 2.0 is opening windows for public-private collaboration.

Globally oriented student base: With literacy and English-medium penetration above 80%, the school-to-university pipeline is underutilised. This variable can be leveraged for spreading awareness and creating an outbound student pipeline from reputed institutions. For instance, developing an early awareness program with missionary networks (Presbyterian, Baptist, Don Bosco schools) can be beneficial.

Cluster-based outreach: Since most outbound-ready students are concentrated in Assam, Meghalaya, and Manipur, with Guwahati, Shillong, Imphal, and Aizawl, they serve as natural catchment hubs. So, the recruitment strategy can be based on select locations instead of Pan-NE.

Digital Ecosystem: Over 5 lakh NE learners are active on national MOOCs (SWAYAM, NPTEL), signalling digital readiness. This, alongside affordability constraints, makes NE an opportunistic destination to engage students in hybrid education and transfer programs.

Conclusion

The North Eastern region represents a strategically under-tapped but high-potential education market. It is defined by strong literacy, distinctive culture, English proficiency, expanding digital reach, and an aspirational youth. Yet, it is constrained by uneven access, affordability, and institutional depth. While Assam remains the academic and recruitment nucleus, emerging hubs like Shillong, Imphal, and Aizawl are shaping new patterns of aspiration and outbound intent. Policy initiatives such as NEP 2020, PM-DEVINE, and Act East are gradually addressing structural deficits and opening pathways for public-private and transnational collaborations. For international universities and education consultants, the opportunity lies in early engagement by leveraging missionary networks, hybrid learning ecosystems, and targeted scholarships.