



Many Routes, One Origin

Purvodaya & the Architecture of Indo-Pacific Trade



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Executive Summary

In a period of geopolitical volatility, trading strength increasingly depends on the number of routes a country can offer, not on the dominance of any single one. India is building that position by combining market access with physical capacity. Trade agreements with the European Union, the United Kingdom, Oman, New Zealand and Australia have been concluded within two years, while a maritime investment horizon approaching ₹80 lakh crore is being assembled under the Maritime Amrit Kaal Vision 2047. Much of this build-out is concentrated in the Purvodaya states, which, together with the North-East, account for about 42.9 crore people, roughly ₹76.5 lakh crore in budgeted GSDP and over ₹4 lakh crore in annual goods exports. This plenary treats the region as the fulcrum of India's Indo-Pacific engagement rather than its periphery, and traces five vectors through which that role is taking shape:

- **Deep sea:** The ₹41,000 crore Galathea Bay transshipment port, cleared by the National Green Tribunal in February 2026, is designed for 16 million TEUs a year. It could bring about three-quarters of India's transshipped containers under Indian jurisdiction.
- **Coastal and port capacity:** Major ports handled a record 915 MT in FY 2025-26. Paradip, Visakhapatnam and Syama Prasad Mookerjee Port together now carry about a third of India's major-port cargo.
- **Inland waterways:** National Waterway 1 now links to the Brahmaputra through Bangladesh. A 2,350 km run from Patna to Guwahati has shown the route works and bypasses the Siliguri corridor.
- **Overland routes:** Land-port trade has grown from ₹5,000 crore in 2014 to ₹83,000 crore. The Land Port Management System is projected to cut border paperwork by 90 percent.
- **Institutional architecture:** The India-EU agreement liberalises trade on 96.6 percent of goods. The ASEAN review, the GCC talks and the BIMSTEC maritime agreement are extending this framework across the Indo-Pacific.

Read together, these vectors give India several independent ways to move goods to and from the Indo-Pacific, all anchored on the same eastern seaboard. The gains, however, are not automatic. The EU's Carbon Border Adjustment Mechanism already applies to the region's core exports of steel and aluminium, and it takes effect before the India-EU agreement's tariff benefits do. The overland and river corridors also depend on conditions in Myanmar and on transit terms with Bangladesh. The brochure argues that two less visible layers will decide how much value stays in the region. The first is services: finance, insurance, freight forwarding and legal expertise, where Kolkata has a long institutional history to draw on. The second is a skilled and more inclusive maritime workforce. The central question for the Conclave is how quickly the eastern hinterland can be equipped to match the gateways being built around it, and who will finance that effort.

The Resilience Proposition that India Makes

In the current geopolitical volatility that defines the world, a trading power is defined as a country that offers the region several trading routes. The tactical steps that are taken to reduce dependency on one corridor or route becomes extremely crucial to facilitate both bilateral and multilateral trade between countries and blocs. India is building a similar strategic position that is ultimately aimed at building resilience regionally and globally.

The evidence is in the pairing of how it is determining its routes and corridors. On one side it is ensuring more market access by means of agreements concluded with the European Union, the United Kingdom, Oman, New Zealand and Australia within two years, and the ASEAN trade pact under active review¹. On the other side, it is building the physical capacity that is required to make the most of that access generated. This includes a maritime investment horizon approaching ₹80 lakh crore under the Maritime Amrit Kaal Vision 2047, built on more than 800 Sagarmala projects worth ₹5.8 lakh crore². India is thus, assembling both access and capacity.

What becomes important to follow is the location where the assembly is happening. Five routes that all have bearing in the Indo-Pacific, including the deep sea, coastal, overland and institutional are being built and demonstrate a concentrated focus in the Purvodaya states.

Viewing Purvodaya as the Fulcrum rather than the Periphery

The historical legacy of the Purvodaya region is one of trade and connectivity, but it has landed at the center of the policy discussion only in recent years. The Bay of Bengal has historically been a working trade seaboard. Kolkata has been a functioning port since 1870, Visakhapatnam since 1933, Paradip since 1966. Purvodaya, is therefore the current chapter of India's Act East Policy. The east is being re-equipped as India's gateway to the Indo-Pacific.

The Purvodaya states and the North-East together account for roughly 42.9 crore people³, approximately ₹76.5 lakh crore in budgeted GSDP⁴, and around ₹4,09,054 crore (~\$48.2 billion)⁵ in annual goods exports which is more than of India's trade. This is a mineral backbone and a maritime frontage in the same territory with iron ore and aluminium from Odisha, base metals and heavy engineering from Jharkhand, engineering goods and steel from West Bengal, marine products and pharmaceuticals from Andhra Pradesh.

Recent economic and industrial policies also reflect a similar trajectory. The Union Budget 2026-27 anchors an East Coast Industrial Corridor node at Durgapur⁶ and extends tourism and connectivity investment across the five Purvodaya states, placing federal capital behind a region that already carries a sixth of national trade.

The positioning of Purvodaya as the hub of trade and infrastructure growth that will be transferred to the Indo-Pacific can be understood through five main points of concentration.

¹ Press Information Bureau, Government of India, "India and European Union Trade Agreement," January 27, 2026, <https://www.pib.gov.in/PressReleasePage.aspx?PRID=2219146®=3&lang=2>.

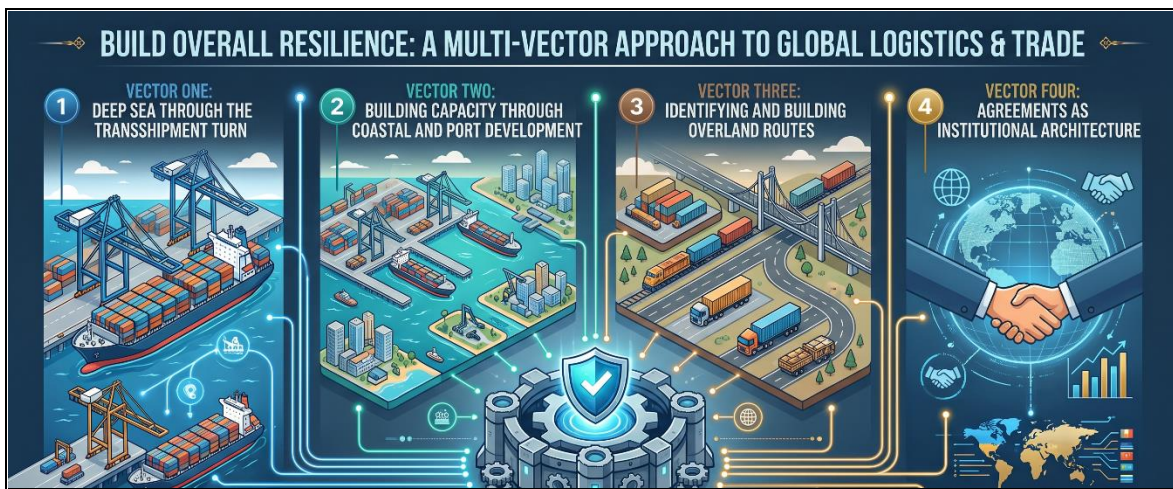
² Observer Research Foundation, "Maritime Sector Development: A Gateway to Viksit Bharat," February 2, 2026, <https://www.orfonline.org/research/maritime-sector-development-a-gateway-to-viksit-bharat>.

³ "Census of India 2011 Population Projections for India and States 2011 -2036 Report of the Technical Group on Population Projections." 2019. https://nhm.gov.in/New_Updates_2018/Report_Population_Projection_2019.pdf.

⁴ , "State Budget Analyses 2026-27," accessed September 23, 2026, <https://prsindia.org/budgets/states>.

⁵ NIRYAT: National Import-Export Record for Yearly Analysis of Trade," accessed September 23, 2026, <https://niryat.gov.in>

⁶ "Travelling Across the Industrial Corridors of India." 2026. Pib.Gov.In. 2026. <https://www.pib.gov.in/www.pib.gov.in/Pressreleaseshare.aspx?PRID=2232996>.



Vector One: Deep Sea through the Transshipment Turn

The Andaman and Nicobar Islands already sit astride the main East–West shipping route. Galathea Bay lies roughly 40 nautical miles from the Strait of Malacca, through which close to a third of global shipping passes, and is near-equidistant from Colombo, Port Klang and Singapore⁷. While the movement is there, there remains the gap of actually transforming it into an architecture that enables India to handle its own domestic cargo.

The International Container Transshipment Port at Galathea Bay was notified as India's thirteenth major port in September 2024, with a natural depth exceeding 20 metres; enough to berth the largest container vessels afloat without dredging. The hub is designed for 16 million TEUs a year across four phases at an estimated ₹41,000 crore (about \$5 billion), aimed squarely at reducing India's dependence on foreign transshipment hubs⁸. The National Green Tribunal cleared the project in February 2026, dismissing petitions seeking to halt it, and the detailed project report is complete, with the terminal structured as a design-build-finance-operate-transfer concession including a free trade warehousing zone. The commercial logic becomes visible in how this will create the opportunity to bring roughly three-quarters of India's transhipped containers within Indian jurisdiction which is currently outside its purview.

Vector Two: Building Capacity through Coastal and Port Development

India has already been investing in maritime structure development over the last few years. India's major ports handled 915.17 million tonnes in FY 2025-26, exceeding the 904 MT target and growing 7.06 percent year on year⁹. Paradip moved a record 156.45 MT, making it India's second-largest major port¹⁰; Visakhapatnam handled

⁷Indian Infrastructure, "Expanding Horizons: Upcoming Mega Projects to Enhance Cargo Handling Capacity," May 7, 2026, <https://indianinfrastructure.com/2026/05/07/expanding-horizons-upcoming-mega-projects-to-enhance-cargo-handling-capacity/>.

⁸Ministry of Ports, Shipping and Waterways, Government of India, "For Development, Operation and Maintenance of Phase-I of International Container Transshipment Port at Galathea Bay in the Great Nicobar Island," accessed September 2026, <https://shipmin.gov.in/en/content/development-operation-and-maintenance-phase-i-international-container-transshipment-portat>.

⁹ET Online. 2026. "India's Major Ports Handle Record 915 MT Cargo in FY26." The Economic Times. Economic Times. April 5, 2026. <https://m.economictimes.com/industry/transportation/shipping/-transport/indias-major-ports-handle-record-915-mt-cargo-in-fy26/articleshow/130037383.cms>.

¹⁰Press Information Bureau, Government of India, "Major Ports Record 915 Million Tonnes Cargo in FY 2025-26, Surpass Target with 7.06% Growth," April 5, 2026, <https://www.pib.gov.in/PressReleasePage.aspx?PRID=2249113®=3&lang=1>.

a record 95 million tonnes, eight percent above its previous best, commissioning a mechanised coal terminal and a deeper outer harbour for Capesize vessels; Syama Prasad Mookerjee Port, with Haldia, moved close to 70 million tonnes and 960,549 TEUs¹¹. The Kolkata Dock System posted the second-highest growth rate among all major ports at 14.28 percent¹². Three eastern port authorities account for roughly a third of all major-port cargo in India.

Sagarmala is advancing 840 projects worth ₹5.8 lakh crore by 2035, of which 272 worth ₹1.41 lakh crore are complete and 217 worth ₹1.65 lakh crore are underway. The Indian Ports Act 2025 has replaced the 1908 framework, aligning centre-state roles and mandating a Maritime State Development Council to plan across 12 major and 213 non-major ports¹³. A Maritime Development Fund with a ₹25,000 crore corpus now provides long-term financing for shipping and shipbuilding¹⁴. These projects reflect the nature of investment that India is making along its coasts to strengthen its position in the Indo-Pacific.

Vector Three: The River Route as Purvodaya's Own Corridor

The corridor that belongs to Purvodaya is the one that runs through it rather than past it. National Waterway 1, the Ganga-Bhagirathi-Hooghly system, extends 1,620 kilometres from Prayagraj to Haldia¹⁵, with capacity along the Haldia-Varanasi stretch augmented under the Jal Marg Vikas Project at an estimated ₹5,369 crore with World Bank assistance¹⁶, and terminals at Sahibganj, Kalughat and Haldia giving cargo fixed points at which to change mode¹⁷. What turns a domestic river into a regional corridor is the link eastward. India has funded 80 percent of a ₹326 crore dredging programme in Bangladeshi waterways to connect it with National Waterway 2 on the Brahmaputra¹⁸, and the route is now proven rather than proposed. A vessel has sailed from Patna via Kolkata and Haldia, entered the Indo-Bangladesh Protocol route through Khulna, Narayanganj and Chilmari, and re-entered Indian waters at Dhubri to berth at Pandu in Guwahati, covering 2,350 kilometres in a single movement¹⁹.

The commercial logic is specific. Coal from Meghalaya, fly ash from Farakka, petroleum products from Numaligarh, bitumen from Haldia, cement inputs, foodgrain and over-dimensional project cargo all move more cheaply per tonne-kilometre by water than by road, and the route bypasses the Siliguri corridor entirely, with an assured depth of 2.5 metres maintained across the 255-kilometre Dhubri-Pandu stretch. This is also the cheapest of the five vectors to extend, since the channel already exists and what is being bought is depth, terminals and night navigation rather than land. Its dependency is equally specific, and it is the transit terms governing the Bangladeshi stretch.

¹¹ "Cargo Handling in 2023-24 at Syama Prasad Mookerjee Port, Kolkata." 2023. Pib.Gov.In. 2023.

<https://www.pib.gov.in/www.pib.gov.in/Pressreleaseshare.aspx?PRID=2017184>.

¹² "Major Ports Record 915 Million Tonnes Cargo in FY 2025–26, Surpass Target with 7.06% Growth." 2025. Pib.Gov.In. 2025.

<https://www.pib.gov.in/www.pib.gov.in/Pressreleaseshare.aspx?PRID=2249113>.

¹³ PRS Legislative Research, "The Indian Ports Bill, 2025," accessed September 2026, <https://prsindia.org/billtrack/the-indian-ports-bill-2025>

¹⁴ Deccan Herald, "Union Budget 2025 Takeaway: Govt to Set Up Maritime Development Fund with Corpus of Rs 25,000 Crore," February 1, 2025, <https://www.deccanherald.com/amp/story/business%2Funion-budget%2Funion-budget-2025-takeaway-maritime-development-fund-with-corpus-of-rs-25000-crore-to-be-set-up-fm-3384095>.

¹⁵ "National Waterways 1 | Inland Waterways Authority of India, Government of India." 2018. Iwai.Gov.In. 2018. <https://iwai.gov.in/offering/national-waterway/national-waterways1>.

¹⁶ "Cabinet Approves Jal Marg Vikas Project for Enhanced Navigation on the Haldia-Varanasi Stretch of National Waterway-1." 2018. Pib.Gov.In. 2018. <https://www.pib.gov.in/www.pib.gov.in/Pressreleaseshare.aspx?PRID=1515177>.

¹⁷ Ministry of Ports, Shipping and Waterways, Government of India, "National Waterways," Sagar Vidya Kosh, accessed September 2026, https://mopsw.nic.in/sagarvidyakosh/index.php?title=National_Waterways.

¹⁸ Ministry of Ports, Shipping and Waterways, Government of India, "Key Initiatives," accessed September 2026, <https://shipmin.gov.in/en/anex-2>.

¹⁹ Press Information Bureau, Government of India, "Brahmaputra (NW2) Gets Connected with Ganga (NW1) via Indo Bangladesh Protocol Route; Cargo Ship Carrying Foodgrains from Patna Docks at Pandu," February 2022, <https://www.pib.gov.in/PressReleaseSelfFramePage.aspx?PRID=1803364®=48&lang=2>.

Vector Four: Identifying and Building Overland Routes

India's land frontier is already a trade channel of consequence. This is reflected in how trade through India's land ports has risen from ₹5,000 crore in 2014 to ₹83,000 crore today²⁰. The Purvodaya region, with its fair share of landlocked regions, have also contributed to this increased trade. Petrapole in West Bengal is the largest land port in South Asia²¹. On the Kaladan corridor, Sittwe port, the Paletwa River terminal and the dredging of the 158-km Kaladan river stretch are complete, with Sittwe now able to take 40,000-tonne vessels.

The remaining Kaladan link is the Paletwa–Zorinpui road into Mizoram; completion of the road component is currently projected for 2027, and once through, it will shorten the Kolkata–Mizoram haul by roughly 700 km against existing circuits. The India–Myanmar–Thailand Trilateral Highway, reported at around 70 percent complete, would run from Moreh in Manipur to Mae Sot in Thailand²². Both are under development, and both depend on conditions along their Myanmar segments.

India is determined to build an infrastructure around land routes in a manner that counters prevalent barriers and results in a seamless architecture. The Land Port Management System launched in 2026 unifies slot booking, gate operations, customs documentation and cargo tracking, and is projected to cut land-border paperwork by 90 percent, truck turnaround times by 40 to 60 percent and gate transaction times by 22 to 35 percent²³. That is corridor capacity created without laying a metre of road.

Vector Five: Agreements as Institutional Architecture

The last two years have witnessed India investing and actively ensuring enough architecture is built institutionally to promote its trade initiatives across the globe. Trade agreements have been one of the primary factors that have played an important role in this regard.

The India–EU agreement, concluded on 27 January 2026 after nearly two decades of negotiation, liberalises trade on 96.6 percent of goods across the EU's 27 members, with Indian industry noting preferential access secured for over 99 percent of Indian exports²⁴. Entry into force is expected in early 2027 following legal scrubbing and ratification. The UK CETA and Oman CEPA sit alongside it.

Market access and market entry, however, are not the same thing. The EU's Carbon Border Adjustment Mechanism entered its definitive financial phase on 1 January 2026, three weeks before the agreement was concluded, and remains in full force under it. Its covered sectors read close to a description of the Purvodaya export basket. ICRIER estimates India's steel exports to the EU could fall 24 percent²⁵, and CEEW puts the effective carbon cost on EU-bound Indian aluminium at 12 to 22 percent of export value²⁶. The sharper constraint is evidentiary rather than industrial: the default emission intensity applied to Indian primary steel is nearly double

²⁰ Manorama Yearbook, "Amit Shah Launches Land Port Management System: What Are Land Ports?," June 10, 2026, <https://www.manoramayearbook.in/current-affairs/india/2026/06/10/vinimay-land-port-management-system.html>.

²¹ IMPRI Impact and Policy Research Institute, "Building an Integrated Digital Border Ecosystem: Land Port Management System (2026)," 2026, <https://www.impriindia.com/insights/policy-update/building-an-integrated-digital-border-ecosystem-land-port-management-system-2026/>.

²² PTI. 2023. "Nitin Gadkari Says 70 Pc Work of India-Myanmar-Thailand Trilateral Highway Complete." The Economic Times. Economic Times. July 2, 2023. <https://m.economictimes.com/news/india/gadkari-says-70-pc-work-of-india-myanmar-thailand-trilateral-highway-complete/articleshow/101431576.cms>.

²³ OpenGov Asia, "India to Launch Land Port Management System to Digitise Border Trade and Travel," June 7, 2026, <https://opengovasia.com/india-to-launch-land-port-management-system-to-digitise-border-trade-and-travel/?c=us>.

²⁴ European Commission, Intellectual Property Helpdesk, "EU-India Free Trade Agreement Concluded: Major Global Trade Milestone," January 29, 2026, https://intellectual-property-helpdesk.ec.europa.eu/news-events/news/eu-india-free-trade-agreement-concluded-major-global-trade-milestone-2026-01-29_en.

²⁵ Business Standard, "India's Steel Exports to EU May Fall 24% Due to CBAM, Says ICRIER Study," June 26, 2026, https://www.business-standard.com/amp/economy/news/india-s-steel-exports-to-eu-may-fall-24-due-to-cbam-says-icrier-study-126062601055_1.html.

²⁶ Policy Circle, "India-EU FTA and CBAM: The Coming Carbon Tax Shock," December 2, 2025, <https://www.policycircle.org/industry/india-eu-fta-cbam-impact/>.

the actual national average, so an exporter without verified installation-level data is penalised for the absence of measurement rather than the presence of carbon, and for the MSMEs that account for roughly 40 percent of Indian steel production, verification systems remain prohibitively expensive. With the agreement expected to enter into force only in early 2027, eastern exporters carry the carbon cost before they receive the tariff gain.

A similar scenario is visible in the region of the Indo-Pacific where active efforts are being made to ensure the maximum potential of trade facilitation can be achieved.

Partner	Status	Scope	Indo-Pacific value
New Zealand	Concluded Dec 2025	Zero-duty access on Indian exports; textiles, gems, IT mobility	Market access in a high-income Pacific economy
Oman (CEPA)	Signed Dec 2025	Duty-free access on 98% of exports; textiles, pharma, petrochemicals	Western anchor of the Indo-Pacific network
Australia (ECTA→CECA)	Announced Feb 2026	Apparel, generic pharma, auto parts, components	Deep long-term trans-Pacific alignment
GCC	ToR signed Feb 2026	Investment flows, services mobility, food and energy corridors	Links South Asia to Gulf capital pools
ASEAN (AITIGA review)	Targeted for conclusion in late 2026	Rules of origin, customs procedures, market access	Bilateral trade of \$128 billion in 2025-26, about 11% of India's global trade

The Bay's own institutional frame is visible through the BIMSTEC Agreement on Maritime Transport Cooperation entering into force in May 2026, across a grouping holding nearly a quarter of the world's population and \$5.2 trillion in combined GDP, where intra-regional trade still stands at only about 7 percent of the total.

The Convergence



The five vectors share the same origin, and that is one of the most important stories to be closely followed in this discussion. If each vector is read separately, it is an infrastructure story but when read together, it becomes India's underlying strategy of becoming the custodian of the Indo-Pacific. A deep-sea hub at the mouth of Malacca, an operating port cluster on the Bay, a river corridor running from the Gangetic plain to the Brahmaputra, an overland spine into mainland Southeast Asia, and a widening lattice of agreements are five independent ways for goods to move between India and the Indo-Pacific.

There is also a route that carries no cargo at all. A net services surplus of \$213.89 billion makes India the region's supplier of digital, financial and professional infrastructure alongside its physical throughput, and this is the one corridor that requires neither dredging nor right of way. Payments architecture, trade finance, marine insurance, classification and survey, freight forwarding and legal services are the layer on which every other vector settles, and it is the layer where an eastern city with an institutional history as long as Kolkata's has an unexercised claim.

The last dimension is the one most easily left out of an infrastructure discussion, which is the people who operate it. India supplies a substantial and rising share of the world's seafarers, and every element described here, from a transshipment terminal to a river terminal to a land port, is finally staffed rather than built. Purvodaya's demographic weight, at roughly 42.9 crore people, meets its infrastructure build-out precisely at this point. The region's advantage is not only that ships will pass its coast, but that the crew, the customs brokers, the marine engineers, the freight forwarders and the terminal operators can be drawn from it, provided the maritime and logistics skilling base is built at the same pace as the berths. Widening participation in that workforce, which remains among the most male-dominated in the Indian economy, is the difference between a region that hosts a corridor and one that is employed by it.

Questions that Guide the Conclave

Diversification and Market Access

What does it take for the Purvodaya region to convert access it has already been handed into shipments, and who are the primary actors who have the potential to make it happen?

Deepening agreements across the Indo-Pacific

If rules of origin tighten and non-tariff barriers ease, which eastern sectors actually gain, and what would a good outcome look like from Kolkata?

Corridors and transactional friction

Digitisation at the gate is cheaper and faster than concrete. Where else in the eastern trade chain such as in customs, port dwell, documentation, inland haulage would a facilitation fix deliver more than an infrastructure one?

Resilient and future-ready supply chains

Over the next five years, what carries the load, and how should exporters sequence their own routing decisions against a build-out that arrives unevenly?

Closing the infrastructure gap

Three eastern port authorities already handle about a third of India's major-port cargo, yet the region produces only 16–17% of national trade against a quarter of its population. Who finances the infrastructure required to turn that eastern port capacity into eastern export value?

Conclusion

The case for Eastern India in the Indo-Pacific does not rest on ambition; it rests on what is already moving. Ports on the Bay handle roughly a third of India's major-port cargo, land-port trade has multiplied sixteen-fold in twelve years, and the agreements opening markets from Brussels to Wellington have been concluded rather than promised. What is being added now, including a deep-water hub at the mouth of Malacca, an overland spine toward mainland Southeast Asia, a modernized ASEAN trade framework, a statutory and financial architecture rebuilt for the first time in a century does not replace any of that. It multiplies the ways in and out. That multiplication is the substance of custodianship: not a single corridor the region must use, but several it may choose from, each anchored on the same seaboard. The routes will keep increasing. The origin will not change. What remains to be settled, and what this session exists to address, is how quickly the hinterland behind these gateways can be made to match them.

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