

Developing the Mobility Grid in India – Screening Emerging Opportunities in Transport Infrastructure Till 2025

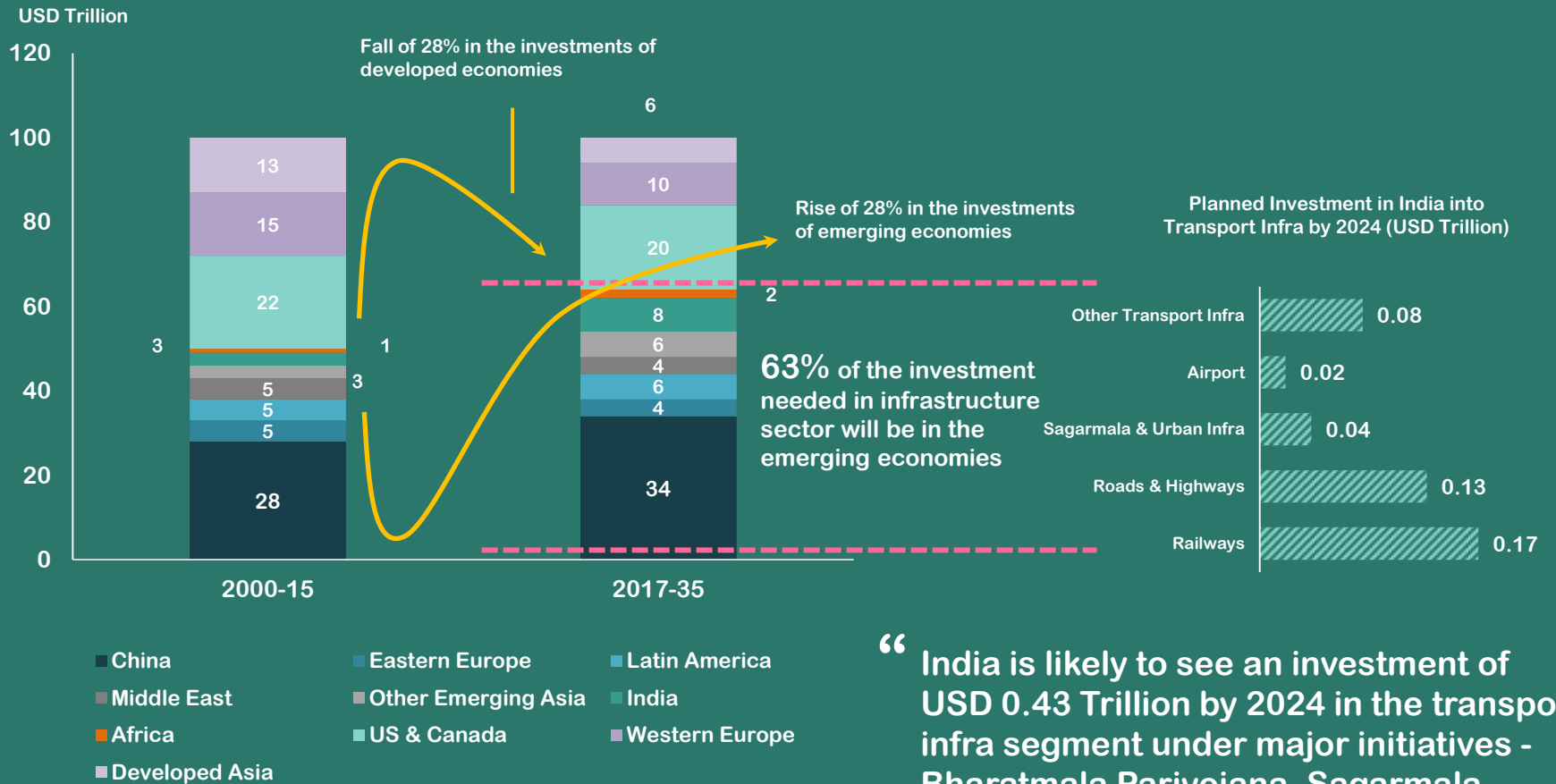
Assessing opportunity across all the modes of transport in India – Roads, Railways, Coastal Shipping, Inland Waterways , Civil Aviation and MRTS + Projects Tracker

E-REP Market Research Series

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Exhibit 01

Anticipated Shift in Infrastructure Investment (USD Trillion) Towards the Emerging Markets by 2035



“ India is likely to see an investment of USD 0.43 Trillion by 2024 in the transport infra segment under major initiatives - Bharatmala Pariyojana, Sagarmala, Railway station redevelopment, inland waterways development and UDAN scheme ”

Source: Mckinsey, enincon research

Why enincon's report upon “ Transportation Sector ” ?

Transport Infrastructure in India to see Remarkable Investments of upto INR 30 Trillion by 2024 – “ *Hail Budget India 2019-20!* ”

Re-Calibrating the PPP model likely to spruce competition in developing airports, roads and railway stations and other multi – modal transportation infra

Transportation has the ability to power lives and plays a large part in controlling our daily movements. Infact, it has become a necessity. From daily commuting to travelling far off places or carrying goods from one place to another, these modes of transportation not only drives our daily life but also support terrifically in economic development. But to support the seamless movement of these varied modes of transport, there is requirement of smart and supportive infrastructure. A best example indicating that how important transport infrastructure is for a growing economy is best shown in Union Budget 2019-20. As per the Union Budget for this fiscal , transport infrastructure in India is anticipated to see remarkable investments of upto INR 30 Trillion by 2024. Railways, Roads and Highways are likely to get the maximum chunk of this planned investment, with railways projected to receive a financial outlay of upto INR 12 Trillion. Taking cues from the leading global economies, this time Indian railways is not just focusing on expanding the networks but to also maintain and enhance the quality of its existing infrastructure – largely the stations. The impetus is on providing improved and facilities at the railway stations matching international standards. Infact about 22 railway stations in the country are likely to get airport like facilities within a tenure of 5-6 years. Habibganj railway station in Bhopal is one such and the first to be developed. It has been re- constructed on the lines of Germany's Heidelberg railway station. The station will have glass dome like structure at the entrance, spacious concourses, 600 comfortable benches, clean and hygienic restrooms, free and secure Wi-Fi, advance surveillance and security systems, plush waiting lounge with dedicated food plazas and cafeterias, Aside from ‘holding areas’ for passengers at every platform, railways will also make an exit underpass for passengers de-boarding trains in order to decongest the platforms.

Significant emphasis is also given on the port –led development through Sagarmala Scheme. The scheme would enhance port connectivity, modernisation and port-linked industrialisation. Further, the rivers interlinking and development of inland waterways to use rivers for cargo movement to decongest road and rail networks is gaining much attention of the Indian government. The government plans to increase the cargo volume on Ganga by four times of what been witnessed presently. These initiatives undoubtedly call for brilliant opportunities for private players to harp on. From enhancing port & terminal connectivity to developing dedicated freight corridors and multi – modal logistic parks. Setting up of economic zones, small industrial port cities, beautification of sites and promoting tourism etc. – there is a lot that can generate substantial revenues.

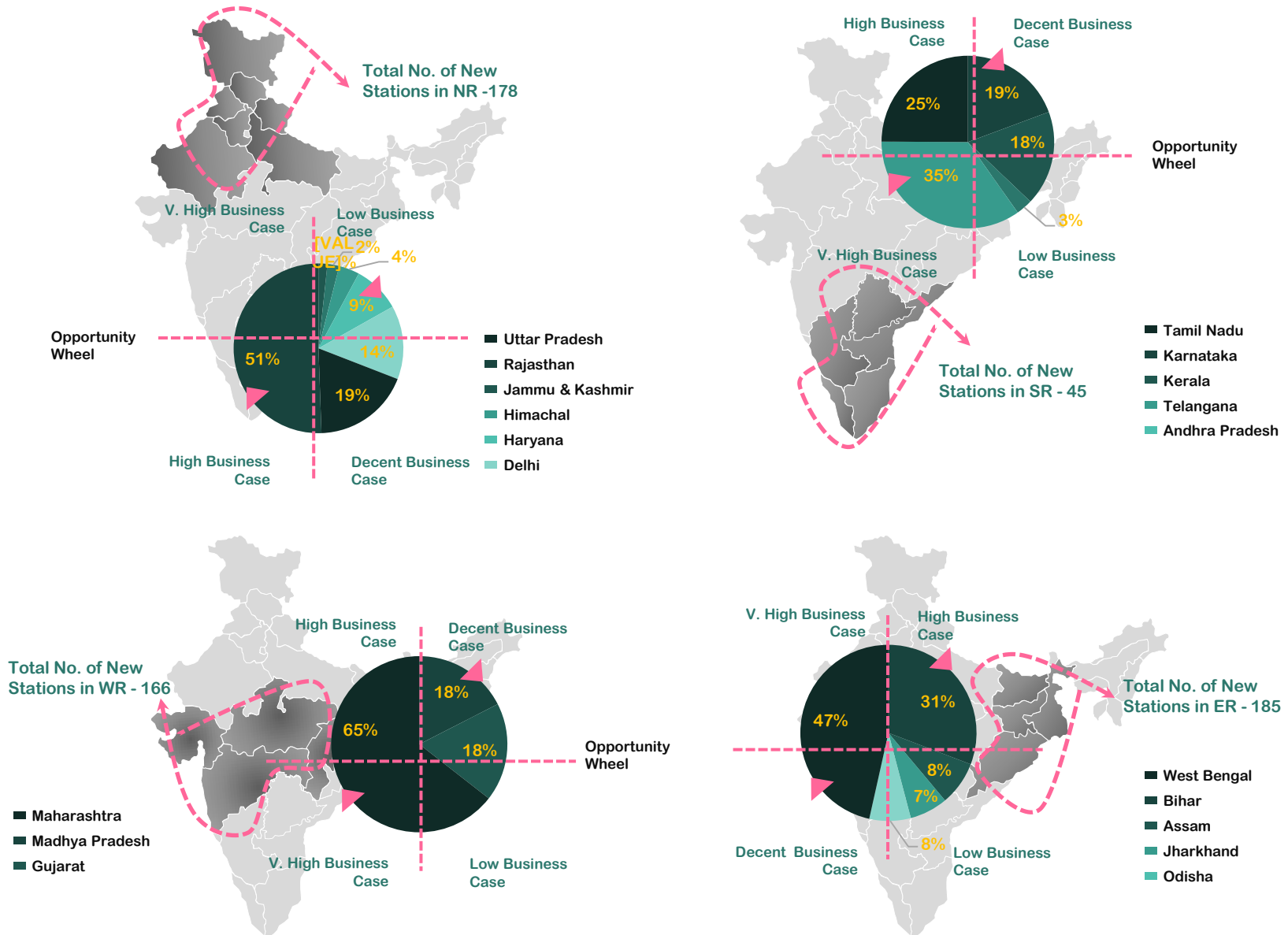
In the roads and highways segment too a similar northbound trend is anticipated regards the development. Upto INR 9 Trillion of investment is projected to be pumped into the roads & highways by 2024. So likewise there are many other investment plans indicated in this year's budget which promises significant business case for building supportive infrastructure across the multi mode transportation. And as the government is likely to re-calibrate the existing PPP models with leasing out infra assets of airports, roads, ports , terminals, railway stations and MRTS to the private bidders, it will open the opportunity barricades for many private construction companies as they will be the major beneficiaries. Strong order books of upto INR 20 Trillion are anticipated for these players given the infra development plans. Hence, enincon team of experts pondered to discover all these opportunities and present them in form of a dossier which factors both high end analysis and robust datasets for seamless transition of business decision making for the industry leaders and associated value chain players. For detailed view on content and coverage of the report , download the table of content.

BUSINESS CASE FOR DEVELOPING TRANSPORT INFRASTRUCTURE IN INDIA

- Development of transport infrastructure in India to receive a capital outlay of INR 25-30 Trillion by 2024
- Indian government to give impetus on the need to enhance port-led development through Sagarmala scheme and develop inland waterways to use rivers for cargo movement to de congest road and rail networks
- Cargo volume on river Ganga is anticipated to grow four times by 2024. Two more inland waterways terminals at Sahibganj in Jharkhand and Haldia in West Bengal likely to get commissioned by the end of FY'2019-20
- A budgetary allocation of INR 450 crore has been announced for inland waterways for FY'2019-20
- Indian railways making efforts to provide improved facilities at the stations including those located in small cities and towns. More focus is given on providing facilities such as – Lifts & escalators, battery operated vehicles, plush waiting lounges, Wi-Fi facility, cafeterias and upgradation of passenger amenities etc.
- Reiteration of focus on setting up new airports and expansion of existing airport capacities. Moreover, the government also plans to improve the connectivity with the underserved /unserved airports
- An investment to the tune of INR 9 Trillion is planned to be pumped into the roads and highways sector

Exhibit 02

Region Wise Opportunity Track for Private Players under Developing New Railway Stations in India till 2030 w.r.t Number of Stations



REPORT INSIGHTS

- Tracking opportunity for private players in developing railway stations infrastructure
- Tracking opportunity for private players in maintaining the transport infrastructure
- Tracking opportunity for private players in developing logistic infrastructure
- Tracking opportunity for private players in developing inter-modal transport infra facility
- Tracking opportunity for private players in developing smart physical infrastructure supporting urban mobility
- Tracking opportunity for private players in developing intelligent transport systems (ITS)
- Tracking opportunity for private players in electric vehicle segment
- Tracking opportunity for private players in commercializing and beautification of inland waterways terminals
- Tracking opportunity for private players in operation and maintenance of transport infrastructure
- Gap Analysis and benchmarking with top countries across the world w.r.t infrastructure development for each distinct modes of transport category
- State wise Opportunity sizing for private players in developing transport infra
- Opportunity sizing for private players in providing RFID services for freight transportation

KEY HIGHLIGHTS

- Opportunity assessment of smart mobility in India
- Screening state wise high opportunity zones for development of economic corridors w.r.t. road transport
- Screening state wise high opportunity zones for development of greenfield expressways w.r.t. road transport
- Assessing state wise business case for developing dedicated freight corridors
- Assessing state wise business case for developing railway tracks
- Assessing state wise business case for developing railway stations
- Assessing state wise opportunity in modernization and expansion of ports infra
- Assessing state wise opportunity in infra development of new ports
- Assessing state wise opportunity in developing inland waterways terminals
- Region wise opportunity track for developing new airports
- Region wise opportunity track for modernizing the existing airports
- Region wise opportunity track for developing the metro rail corridors

PRESS EXCERPTS

“ Railways, roads and highways sector are to get the largest chunk of investment over the next five years as the government is expected to spend INR 30 trillion in the transport sector in India ”

Economic Times

“Public-Private-Partnership proposed for development and completion of tracks, rolling stock manufacturing and delivery of passenger freight services”

Money Life News

MUST BUY FOR

- Large Construction Companies – L&T, Reliance Infra, GMR Infrastructure, Jaiprakash Associates, Hindustan Construction Company, GVK Power and Infrastructure Limited, Lanco Infratech, Punj Lloyd Infrastructure Limited, IVRCL Infra, Afcons Infra, Gammon India, Gayatri Projects, Ramky Infrastructure and many more likewise
- Project Sub vendors
- OEMs
- Intelligent Transport Systems (ITS)
- Project Financing Bodies
- Project Management Consultants
- Government Agencies
- Research firms/ Institutes
- Project Consultants
- Industry Associations / Technical Consulting Group

WHAT YOU CAN LEARN ? A SNAPSHOT

- A know how on transportation sector in India
- Opportunity assessment in road transport and supportive infrastructure till 2025
- Opportunity assessment in railways and supportive infrastructure till 2025
- Opportunity assessment in civil aviation and supportive infrastructure till 2025
- Opportunity assessment in coastal shipping and supportive infrastructure till 2025
- Opportunity assessment in inland waterways and supportive infrastructure till 2025
- Opportunity assessment in metro rail and supportive infrastructure till 2025
- Opportunity assessment in developing smart physical infrastructure in India till 2025
- Opportunity assessment for intelligent transport systems manufacturers/ service providers till 2025
- Opportunity assessment for alternate fuels till 2025
- Policy and regulatory landscape in transportation sector in India
- Tracker of upcoming /underconstruction transportation projects in India



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Happiness does not come from doing easy work but from the afterglow of satisfaction that comes after the achievement of a difficult task that demanded our best

- Theodore Isaac Rubin