

URBAN RAIL IN INDIA 2019

Market Analysis, New Technologies and Systems, Upcoming Projects and Opportunities

India has emerged as a fast growing market for urban rail systems. Currently, 10 cities have an operational urban rail network spanning 536 km. The network has grown significantly over the past 12-13 years, up from about 90 km in 2006. With the Metro Rail Policy 2017 in place, several cities are ready to roll out work to develop their respective urban transit systems. In the last five years, 13 new metro projects with a total length of about 248 km have been approved for implementation. Further, about 750 km of metro rail network and 373 km of rapid rail transit network is under planning in various cities. While metro will continue to be the dominant mode, new modes such as trams, rapid rail, light rail are also gaining traction. State-of-the-art rolling stock and advanced signalling and telecommunication systems are expected to be deployed as part of these projects. Innovations and developments in the fare payments industry are resulting in the adoption and use of a variety of payment methods, especially interoperable electronic payment methods such as smartcards, bank cards, mobile wallets and near-field communication (NFC)-enabled devices. The current level of activity in the urban rail sector spells significant opportunity for consultants, developers, contractors, operators, rolling stock manufacturers, signalling and communications technology providers, fare system providers, equipment manufacturers, construction material suppliers, software solution providers, etc.

Global Mass Transit Research has released the Urban Rail in India 2019 report - the most comprehensive and up-to-date study on the Indian urban rail market. The report is available in PDF format and MS Excel Database.

The report is divided into **three sections** with **seventeen chapters**:

Section I: Market Analysis, Key Trends and Recent Developments

- Executive Summary
- Sector Overview
- Metro Rail Policy, 2017 - Impact and Challenges
- Analysis of Operational Projects
- Analysis of Upcoming Projects
- Future Outlook and Market Opportunities (Till 2024-25)
- Emerging Areas of Growth
- Ownership Structure and Key Players
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- Station Area Development and Inter-Modal Integration

- Construction - At Grade and Elevated Structures
- Traction and E&M

Section III: Project Profiles*

- Operational and Under Construction Projects
- Upcoming Projects (Announced, Planned, Approved and Under Bidding Projects)
- Light Rail Transit Projects
- Monorail Projects

Section II: Segment Analysis, Outlook and Opportunities (Till 2024-25)

- Rolling Stock
- Signalling, Train Control and Telecommunications
- Fare Collection Systems
- Metro Tunnels

Each profile provides information on project background and scope (network length, number of stations, rolling stock, fare system, signalling and telecommunication, traction, etc.), implementing agency, project cost, time and cost overruns, key consultants, key contractors, key milestones, sources of fund, recent contracts, upcoming tenders, current status, etc.

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[Each profile covers the project background and scope (network length, number of stations, rolling stock, fare system, signalling and telecommunication, traction, etc.), the implementing agency, project cost, time and cost overruns, key consultants, key contractors, key milestones, sources of fund, recent contracts, upcoming tenders, current status, etc.]

Sources and Methodology

Global Mass Transit Research's industry analysts have utilised primary and secondary research sources in preparing this report. Primary sources include information obtained through telephone interviews and emails from public transport authorities, operators and regulators. Secondary sources include, but are not limited to, project websites and status reports; websites, annual reports, capital programmes and financial reports of transport authorities and operators; documentation provided by relevant financing institutions; investor presentations; analyst reports; government plans and documents; websites of ministries and regulators; websites of industry associations; internal and external proprietary databases; news articles; and press release reports. Wherever applicable, research sources are cited within the report.

Our analysts and researchers have combined the information from these primary and secondary sources with their industry expertise to synthesise the qualitative and quantitative analysis presented in this report. In cases where data was not available, we have used the estimates from authentic published reports or press releases.

Great care has been taken to ensure that all analysis is supported by facts. In situations where facts were not available and assumptions were made to conduct analysis, we have explained our assumptions and our methods of estimation.

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