

# SMART CITIES IN INDIA 2019

Segment Analysis, Trends and Developments,  
Future Outlook and Market Opportunities

- ❖ Report (PDF)
- ❖ Data-set (Excel)

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The Ministry of Housing and Urban Affairs has selected 100 cities since the launch of Smart Cities Mission (SCM) in July 2015. Together, these cities offer a pipeline of around 5,100 projects entailing an investment of over Rs 2 trillion.

Almost four years into implementation, the central government's mission has gained significant traction. It witnessed a surge in activity in the last financial year (2018-19), with over 2,300 projects worth around Rs 910 billion tendered. Nearly 72 per cent of these projects worth around Rs 510 billion have been completed or are at different stages of implementation.

Innovative technology-led initiatives such as advanced communications systems, intelligent transit management systems, smart meters, GIS and GPRS for solid waste management, online billing systems and mobile-based complaint redressal systems, are being implemented across cities. Greenfield smart cities such as Gujarat International Finance Tec-City, Naya Raipur and Lavasa can serve as examples or models for other cities.

For the effective and timely execution of projects, the process for obtaining clearances, land acquisition, etc. needs to be fast-tracked. Also, given the financial constraints and inefficiencies of ULBs, active participation from the private sector will be inevitable. Having said that, the SCM will go a long way in developing core infrastructure services in India's urban centres. It will also create opportunities for various stakeholders such as project developers, contractors, equipment suppliers and technology providers.

## Executive Summary

### SECTION I: PROGRESS, DEVELOPMENTS AND CHALLENGES

#### 1. Overview and Mission Update

- ❖ Scope and Features
- ❖ Investment Requirements
- ❖ Sources of Funding
- ❖ Union Budget 2019-20: Key Announcements and Likely Impact
- ❖ Overall Progress
- ❖ International Collaborations
- ❖ Other Key Initiatives under the Smart Cities Mission (CITIIS [Cities Investments to Innovate Integrate and Sustain], "Ease of Living" Index, etc.)
- ❖ Issues and Challenges
- ❖ The Way Forward

#### 2. Analysis of Completed Projects

- ❖ Overall No. of Projects Completed
- ❖ Analysis by:
  - By Segment
  - By City
  - By Category (Area-based versus Pan-based)
  - Mode of Implementation
- ❖ Investments Mobilised in Completed Projects
- ❖ Most Progressive Cities in terms of Completion Rates

#### 3. Analysis of Project Pipeline

- ❖ Overall Project Pipeline
- ❖ Project Pipeline Analysis
  - By Category (Area-based and Pan-City Development)
  - By Segment\*
    - \*Smart energy, smart governance and communication, smart mobility, smart safety and security, smart water and waste management, affordable housing, etc.
  - By Mode of Implementation (PPP and non-PPP)
  - By Status\*
    - \*Under implementation, contracts awarded, bidding/tendering, preliminary/planned/proposed
  - By State
  - By City
  - By Period of Completion
- ❖ Top 10-15 Key Investment Cities
- ❖ Top 50 Upcoming Projects

#### 4. Future Outlook and Market Opportunities (Till 2024-25)

- ❖ Growth Drivers
- ❖ Investment Projections
- ❖ Market Opportunities
  - Developers
  - EPC Contractors
  - Financiers/Long-Term Investors
  - Technology and Equipment Providers
  - Consultants
  - Survey and Investigation Firms
  - Other stakeholders

#### 5. Financing Needs and Challenges

- ❖ Key Sources of Funding (central and state governments, bilateral/multilateral borrowing, convergence with other government schemes, PPPs, etc.)
- ❖ New and Innovative Financing Sources
- ❖ Fund Allocation and Disbursement (city-wise and round-wise)
- ❖ Recent Government Measures
- ❖ Risks and Challenges

#### 6. Potential for Private Investment

- ❖ Planned Investment from PPPs
- ❖ Key Thrust Areas
- ❖ Experience So Far
- ❖ Update on PPP Projects (city-wise and segment-wise)
  - Projects Completed
  - Projects under Implementation
  - Projects under Planning/Announced Stages
- ❖ Issues and Challenges
- ❖ Future Potential and Outlook

#### 7. Experience with Greenfield Smart Cities

- ❖ GIFT City
- ❖ Lavasa
- ❖ Dholera
- ❖ Vikram Udyogpuri
- ❖ Integrated Industrial Township Greater Noida Limited
- ❖ Others

Each case study provides information on key focus areas (mobility, water and waste, energy, governance, safety and security, buildings, communication, etc.); new innovations and technologies; best practices; issues and challenges and key learnings.

**8. Experience with Non-Mission Cities**

- ❖ Greater Mumbai
- ❖ Amravati
- ❖ Delhi (Non-NDMC area)
- ❖ Cuttack
- ❖ Mysuru
- ❖ Others

Each case study provides information on key focus areas (mobility, water and waste, energy, governance, safety and security, buildings, communication, etc.); new innovations and technologies; best practices; issues and challenges and key learnings.

**SECTION II: ROUND-WISE UPDATE****9. Round I (First 20 cities) and Fast Track Cities (13 cities)****10. Round II Cities (27 cities)****11. Round III Cities (30 cities)****12. Round IV Cities (10 cities)**

Each chapter will cover investment requirements, key sources of funding, progress on projects, best practices/case studies, projects completion timelines, upcoming tenders, and outlook and opportunities.

**SECTION III: SEGMENT ANALYSIS****13. Mobility**

- ❖ Key Segments/Technology Solutions
- ❖ Performance Indicators
- ❖ Noteworthy Initiatives/ Projects
- ❖ Issues and Challenges
- ❖ Key Learnings
- ❖ Proposed Investments
- ❖ Outlook and Opportunities (till 2025-26)

**14. Energy**

- ❖ Key Segments/Technology Solutions
- ❖ Performance Indicators
- ❖ Noteworthy Initiatives/ Projects
- ❖ Issues and Challenges
- ❖ Key Learnings
- ❖ Proposed Investments
- ❖ Outlook and Opportunities (till 2025-26)

**15. Water and Waste Management**

- ❖ Key Segments/Technology Solutions
- ❖ Performance Indicators
- ❖ Noteworthy Initiatives/ Projects
- ❖ Issues and Challenges
- ❖ Key Learnings
- ❖ Proposed Investments
- ❖ Outlook and Opportunities (till 2025-26)

**16. Safety and Security**

- ❖ Key Segments/Technology Solutions
- ❖ Performance Indicators
- ❖ Noteworthy Initiatives/Projects
- ❖ Issues and Challenges
- ❖ Key Learnings
- ❖ Proposed Investments
- ❖ Outlook and Opportunities (till 2025-26)

**17. Governance and Communication**

- ❖ Key Segments/Technology Solutions
- ❖ Performance Indicators
- ❖ Noteworthy Initiatives/Projects
- ❖ Issues and Challenges
- ❖ Key Learnings
- ❖ Proposed Investments
- ❖ Outlook and Opportunities (till 2025-26)

**18. Other Focus Areas**

- ❖ Affordable Housing Education
- ❖ Parking
- ❖ Street Lighting
- ❖ Healthcare
- ❖ Capacity Building
- ❖ Roads and Flyovers
- ❖ City Gas Distribution
- ❖ Public Amenities

**SECTION IV: PROFILES OF KEY COMPLETED PROJECTS**

This section will cover brief profiles of key completed projects across various segments.

**Each profile will cover:**

- ❖ Scope
- ❖ Project Cost
- ❖ Source of Funding
- ❖ Type of Project (Area-based or Pan-City)™
- ❖ Contractor/Developer™
- ❖ Technology/Service Provider
- ❖ Completion Date (wherever available)
- ❖ Key Challenges
- ❖ Lessons Learnt

**SECTION V: DATABASE OF KEY PROJECTS**

The report will also provide a comprehensive Excel-based database of ongoing and upcoming projects across the water supply, sewerage, waste, energy, mobility, roads, flyovers, safety and security, e-governance, healthcare, capacity building and city gas distribution segments.

Each project will provide information on:

- ❖ Scope
- ❖ Current Status
- ❖ Mode of Implementation
- ❖ Implementing agency
- ❖ Project Cost
- ❖ Type of Project (Area-based or Pan-City)
- ❖ Contractor/Developer
- ❖ Expected Date of Completion, etc.

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**Sumita Kanjilal**  
 Information Products  
 India Infrastructure Publishing Pvt. Ltd.  
 B-17, Qutab Institutional Area, New Delhi 110016, India  
 Tel: +91-11-46560421, 41034600, 41034601 Fax: +91-11-26531196  
 Mobile: +91-9958299609  
 Email: sumita.kanjilal@indiainfrastructure.com