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URBAN RAIL MARKET IN INDIA 2024

Market Analysis, Growth Trends and Upcoming Opportunities

- ❖ Research Report
- ❖ Data-set (Excel)
- ❖ 52 Weekly Newsletters

The Urban Rail Market in India 2024 report will cover the following:

- ❖ Sector Overview, Network Growth and Market Opportunities
- ❖ Recent Developments, Emerging Trends and Technology Innovations
- ❖ Upcoming Projects, Key Contract Awards and Tenders
- ❖ Analysis of Key Sub-segments – Construction, Rolling Stock, S&T, Traction, Fare Collection
- ❖ Market Projections and Investment Requirements
- ❖ Detailed Profiles of 50+ Completed and Upcoming Urban Rail Transit Systems

EXECUTIVE SUMMARY

SECTION I: SECTOR TRENDS, ANALYSIS, OUTLOOK AND OPPORTUNITIES

1. Market Overview and Key Trends

- ❖ Network Size and Growth
- ❖ Ridership Trends and Analysis
- ❖ Fare Trends and Analysis
- ❖ Key Government Initiatives
- ❖ Emerging Trends
- ❖ Recent Developments
- ❖ Risks and Challenges
- ❖ Future Outlook and Industry Recommendations

2. Project Pipeline Analysis and Assessment

- ❖ Analysis by
 - Forms of Mass Transit (Metro Rail, Metro Neo, MetroLite, Monorail and RRTS)
 - Stage of Development (Announced, Approved, Awarded, Under Bidding, Under Construction)
 - Mode of Implementation (EPC, PPP)
 - Alignment (Elevated/Underground/At grade)
 - Expected Completion
- ❖ State-wise Analysis
- ❖ Top Upcoming Projects in terms of Investments
- ❖ Key Upcoming Tenders

3. New Modes of Transit (Metrolite, Metroneo, RRTS and Water Metro)

- ❖ Current Market Size
- ❖ Key Operating Features, Standards and Specifications
- ❖ Cost Economics and Analysis
- ❖ Key Collaborations (Technology, Financing, etc.)
- ❖ Key Upcoming Projects

4. Investment and Financing Trends

- ❖ Trends in Funding
- ❖ Key Revenue Sources
- ❖ New Revenue Streams
- ❖ Innovative Funding Options (Land Value Capture, TOD Policy, Deferred Capex, Bonds, etc.)
- ❖ Cost Components and Project Economics
- ❖ PPP Landscape
 - Experience So Far
 - Potential for Unbundled PPPs
 - Upcoming PPP Projects
- ❖ Investment Outlook

5. Market Opportunities and Key Projections

- ❖ Projected Network Addition
 - Immediate term (By 2025)
 - Near to Medium term (By 2028)
 - Medium to Long Term (2029 and Beyond)
- ❖ Projected Ridership
- ❖ Projected Investment Requirements (New Construction, Network Expansion, Rolling Stock, Signaling Systems, AFC Systems, Traction, etc.)
- ❖ Market Opportunities and Outlook

6. New and Emerging Opportunities

- ❖ Focus on Integrated Mobility
- ❖ Transit Oriented Development
- ❖ Real Estate and Commercial Development
- ❖ Project Management (BIM, CDE, Cloud Computing, Other Dashboards/Software, etc.)
- ❖ First and Last-Mile Connectivity
- ❖ Train leasing and O&M Outsourcing
- ❖ Technology and Digital Solutions (MaaS, IoT, Big Data, Account-based Ticketing, etc.)
- ❖ Smart Station Solutions (Smart Depot, Energy Conservation, etc.)

SECTION II: SEGMENT ANALYSIS: GROWTH, KEY DEVELOPMENTS, AND PROJECTIONS

7. Rolling Stock

- ❖ Market Size and Growth
- ❖ Systems in Use and their Specifications
- ❖ Production and Supply
- ❖ Emerging Trends
- ❖ Competitive Landscape and Key Suppliers
- ❖ Recent Contract Awards
- ❖ Procurement Plans
- ❖ Segment Outlook and Projections

8. Signalling, Train Control and Telecommunications

- ❖ Market Size and Growth
- ❖ Technologies and Systems in Use
- ❖ Recent Deployments and New Innovations
- ❖ Competitive Landscape and Key Players
- ❖ Recent Contracts Awards
- ❖ Future Plans
- ❖ Segment Outlook and Projections

9. Fare Collection and Advancements

- ❖ Size and Growth
- ❖ Systems in Use and their Specifications (Closed loop, Open loop, QR code-based ticketing, etc.)
- ❖ Innovations in Fare Media (NCCM, contactless ticketing, mobile wallets, etc.)
- ❖ Recent Deployments
- ❖ Competitive Landscape and Key Players
- ❖ Recent Contract Awards
- ❖ Future Plans of Metro Corporations
- ❖ Segment Outlook and Projections

10. Construction: Elevated and At-grade Structures

- ❖ Size and Growth
- ❖ Cost Analysis
- ❖ Prevalent and Emerging Methods and Techniques
- ❖ Role of Technology
- ❖ Best Practices and Experience so far
- ❖ Key Contractors and Market Share
- ❖ Recent Contract Awards
- ❖ Segment Outlook and Projections

11. Construction: Metro Tunnels

- ❖ Size and Growth
- ❖ Cost Analysis
- ❖ Prevalent and Emerging Methods and Techniques
- ❖ Analysis of TBM Market
- ❖ Key Contractors and Market Share
- ❖ Best Practices in Tunnel Design and Construction
- ❖ Recent Contract Awards
- ❖ Segment Outlook and Projections

12. Traction

- ❖ Size and Growth
- ❖ Systems in Use and their Specifications
- ❖ New Innovations
- ❖ Energy Management and Conservation Initiatives (Traction)
- ❖ Energy Management and Conservation Initiatives (Non-Traction)
- ❖ Key Contractors and Market Share
- ❖ Recent Contract Awards
- ❖ Segment Outlook and Projections

13. Station Infrastructure and Key Components

- ❖ Market Size and Growth
- ❖ Recent Developments under:
 - Elevators
 - Climate Control and Ventilation Systems
 - Public Information Display Systems
 - Platform Screen Doors
 - Security and Surveillance
 - Others
- ❖ Key Players
- ❖ Recent Contract Awards
- ❖ Segment Outlook and Projections

SECTION III: PROJECT FOCUS: DETAILED PROFILES OF OPERATIONAL AND UPCOMING METRO RAIL PROJECTS**14. Key Project Profiles****❖ Metro Rail**

- Agra Metro Rail
- Ahmedabad-Gandhinagar Metro (Phase I and Phase II)
- Bengaluru Metro (Phase I, Phase II, Phase 2A, Phase 2B and Phase III)
- Bhopal Metro Rail Phase I
- Bhubaneswar-Cuttack Metro Rail
- Chennai Metro (Phase I, Phase I Extension and Phase II)
- Coimbatore Metro Rail
- Delhi Metro (Phase I, Phase II, Airport Express Line, Airport Express Line Extension, Phase III, Phase IV, Gurgaon Rapid Metro- Phase I and Phase II)
- Hyderabad Metro Rail (Phase I and Phase II)
- Indore Metro Rail Phase I

- Jaipur Metro Rail (Phase I and Phase II)
- Kanpur Metro Rail Phase I
- Kochi Metro (Phase 1, Phase 1A, Phase 1B, Phase II and Water Metro)
- Kolkata Metro (North-South, North South Expansion and East-West)
- Lucknow Metro Rail
- Mumbai Metro (Line 1, 2A, 2B, 3, 4, 4A, 4, 6, 7, 7A, 9, 8, 10, 11, 12, 13, 14 and Monorail Line 1)
- Nagpur Metro (Phase I and Phase II)
- Navi Mumbai Metro Rail
- Noida-Greater Noida Metro Rail Project (Aqua Line and Aqua Line Extension)
- Patna Metro Rail Phase I
- Pune Metro (Corridor I, II, III, Swargate to Katraj Corridor and Line III Extension)
- Surat Metro Rail
- Thane Metro Rail
- Thiruvananthapuram Metro Rail
- Others

❖ Metrolite/LRT

- Ahmedabad-Dholera SIR Light Rail
- Chennai LRT
- Gorakhpur Light Rail
- Gurgaon-Faridabad Light Rail
- Guwahati Metrolite Phase I
- Jammu Light Rail
- Kozhikode LRT
- Nagpur Metrolite
- Noida Sector 142 – Botanical Garden Metrolite
- Raipur Metrolite
- Rajkot (Metrolite/MetroNeo)
- Prayagraj Light Metro Rail Phase I
- Pune LRT
- Srinagar Light Rail Phase I
- Varanasi Light Rail
- Visakhapatnam Light Metro Rail
- Vijayawada Light Rail

❖ MetroNeo

- Bhavnagar MetroNeo
- Nashik MetroNeo
- Pune MetroNeo
- Warangal MetroNeo

❖ RRTS

- Delhi-Ghaziabad-Meerut Regional Rapid Transit System
- Ghaziabad-Jewar Airport Regional Rapid Transit System
- Delhi-Panipat-Karnal Regional Rapid Transit System
- Delhi-Gurugram-SNB Regional Rapid Transit System Phase I
- Madhya Pradesh Regional Rapid Transit System

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Contact details:

Farhan Ahmed

Vice President, Sales-Information Products
 India Infrastructure Publishing Pvt. Ltd.,
 B-17, Qutab Institutional Area, New Delhi - 110 016, India
 Mobile: **9891309676**
 Email: farhan.ahmed@indiainfrastructure.com