

Railways in India 2022

Recent Progress, Upcoming Opportunities
and Future Projections

- ❖ Access to Rail Tracker
- ❖ Research Report
- ❖ Data-set (Excel)
- ❖ 52 Weekly Newsletters
- ❖ 11 Monthly Updates

The Railways in India 2022 report will help you to:

- ❖ Analyse the sector trends, progress and developments
- ❖ Track the pipeline of upcoming, under bidding and ongoing projects
- ❖ Learn about the sector's outlook and projections
- ❖ Identify the market opportunities under mega programmes
- ❖ Gather insights across key segments - Rolling Stock, Tracks, S&T, Bridges, Tunnels, etc
- ❖ Support business planning and strategies

The railway sector has been growing steadily for the past decade or so, in terms of both infrastructure and investment. The average pace of commissioning of new lines, doubling, and third- and fourth-line projects has increased from 4.2 km per day during 2009-14 to 7.3 km per day during 2015-20. Although growth in 2020 has been hampered by the Covid-19 crisis, overall, in 2020-21, IR achieved 48 per cent of its target of commissioning 3,750 km of new line, gauge conversion and doubling works. Indian Railways (IR) has almost reached normalcy in operations now and is hopeful of achieving its target of 2,400 km for the current fiscal year. The recently launched National Monetisation Pipeline has highlighted assets worth Rs 1.52 trillion over the next four years. In addition, a total capital investment of Rs 13 trillion has been planned for the railways sector during 2020-25 under the National Infrastructure Pipeline. With more than 34,000 km of network expansion and upgradation works in progress, significant opportunities exist for engineering, procurement and construction players, rolling stock providers, signalling and telecom players, electrification equipment manufacturers and consultants.

Executive Summary

SECTION I: SECTOR ANALYSIS, OPPORTUNITIES AND OUTLOOK

1. Sector Progress and Key Trends

- ❖ Network Growth (Past Five years)
- ❖ Project Award and Completion Trends (2016-17 to 2021-22)
 - New Lines
 - Doubling/Tripling
 - Gauge Conversion
 - Electrification
- ❖ Traffic and Earnings Trends
 - Freight
 - Passenger
- ❖ Key Recent Developments
- ❖ Impact of Covid-19 on:
 - Ongoing Projects and New Bids
 - Investments
 - IR Traffic and Revenues
 - Contractors (order books, revenues, capex, etc.)
- ❖ Investment Requirements
- ❖ Risks and Challenges
- ❖ Sector Outlook

2. Outlook and Key Projections (Till 2026-27)

- ❖ Network Addition Projections
- ❖ Traffic and Earnings Projections
- ❖ Investment Projections
- ❖ Project Award and Completion Targets
- ❖ Opportunities for Private Participation
- ❖ Material & Equipment Demand Projections
- ❖ Policy Outlook

3. Investment and Market Opportunities (Till 2026-27)

- ❖ Investment Opportunities Under:
 - National Infrastructure Pipeline
 - Mega Programmes
 - Dedicated Freight Corridors
 - High-Speed Rail
 - Station Infrastructure Redevelopment
 - Regional Rapid Transit System
 - Suburban Rail System
 - Mission Electrification
 - National Monetisation Pipeline
 - Track Construction
 - Rolling Stock
 - Signalling & Telecommunication
- ❖ Market Opportunities for:
 - Project Developers
 - EPC Contractors
 - Financiers/Investors
 - Equipment Providers
 - Steel Manufacturers
 - Other Construction Material Suppliers
 - Consultants/PMCs

4. Project Pipeline Analysis

- ❖ Assessment of Project Pipeline:
 - Short Term (By 2022-23)
 - Medium Term (By 2025-26)
 - Long Term (2026 and Beyond)
- ❖ Analysis by Segment (New Lines, Doubling, Gauge Conversion, Electrification, Tunnels, Rolling Stock, S&T, etc.)
- ❖ Analysis by Stage of Development
 - Under Construction
 - Awarded
 - Awaiting Clearances/Land Acquisition
 - Announced
 - Proposed/Planned

- ❖ Analysis by State
- ❖ Analysis by Railway Zone
- ❖ Top Upcoming Projects in Terms of Investment

The detailed project pipeline will be provided in the dataset with parameters like scope of work, length, cost, implementing agency, developer, contractor, current status, expected COD, etc.

SECTION II: PROGRESS AND OPPORTUNITIES UNDER MEGA PROGRAMMES

5. Dedicated Freight Corridors: Ongoing and Planned

- ❖ Progress So Far & Key Milestones
- ❖ Financing Experience & Funding Options
- ❖ Targets & Timelines
- ❖ New Technologies & Solutions
- ❖ Update on Upcoming/New Corridors
- ❖ Upcoming Contracts & Tenders
- ❖ Investment Requirements
- ❖ Traffic Projections

6. High Speed Rail Systems

- ❖ Progress So Far & Key Milestones
- ❖ Financing Structure
- ❖ Targets & Timelines
- ❖ New Technologies & Solutions
- ❖ New Corridors/Sections Identified
- ❖ Issues & Challenges
- ❖ Upcoming Contracts & Tenders
- ❖ Investment Requirements

7. Station Infrastructure Redevelopment

- ❖ Progress So Far & Key Milestones
- ❖ Financing Experience and New Funding Options
- ❖ Targets & Timelines
- ❖ New Technologies and Solutions
- ❖ Upcoming Opportunities
- ❖ Issues and Challenges
- ❖ Upcoming Contracts and Tenders
- ❖ Investment Requirements

8. Regional Rapid Transit System

- ❖ Progress So Far & Key Milestones
- ❖ Financing Structure
- ❖ Targets & Timelines
- ❖ New Technologies and Solutions

- ❖ Upcoming Opportunities
- ❖ Issues and Challenges
- ❖ Upcoming Contracts and Tenders
- ❖ Investment Requirements

9. New Suburban Rail Systems

- ❖ Progress So Far & Key Milestones
 - Bengaluru Suburban Rail System
 - Mumbai Urban Transport Project Phases 3 and 3A
- ❖ Targets & Timelines
- ❖ New Technologies & Solutions
- ❖ Issues & Challenges
- ❖ Upcoming Contracts & Tenders
- ❖ Investment Requirements

SECTION III: TRENDS IN OPERATIONAL AND FINANCIAL PERFORMANCE

10. IR's Financial Performance

- ❖ Growth Trends (2016-17 to 2020-21)
 - Capital Expenditure
 - Operating Ratio
- ❖ Impact of Covid-19 on IR's Revenue & Expenditure in 2020-21
- ❖ Cost Trends
- ❖ Revenue Trends
- ❖ Revenue Surplus
- ❖ Recovery Trend & Revival Strategies
- ❖ New Funding/Revenue Sources
- ❖ Asset Monetisation Plan
- ❖ Potential for Raising Private Funds

11. Freight Traffic and Earnings

- ❖ Key Trends (2016-17 to 2020-21)
 - Traffic Trends
 - Earning Trends
- ❖ Impact of Covid-19 on Monthly Traffic & Earnings in 2021-22
- ❖ Commodity-wise Trends in Freight Traffic and Earnings
 - Coal
 - Cement
 - Food grains
 - Steel
 - Iron Ore
 - Fertilisers
 - Mineral Oil
 - Container service
 - Others

- ❖ Initiatives for Improving Freight Traffic
- ❖ Freight Traffic Projections
- ❖ Segment Outlook

12. Passenger Traffic and Earnings

- ❖ Key Trends (2016-17 to 2020-21)
 - Traffic Trends
 - Earning Trends
- ❖ Impact of Covid-19 on Monthly Traffic & Earnings in 2021-22
- ❖ Suburban and Non-Suburban Traffic and Earnings Analysis
- ❖ Class-wise Traffic and Earnings Analysis
- ❖ Initiatives for Improving Passenger Amenities
- ❖ Revival Strategies
- ❖ Passenger Traffic Projections
- ❖ Segment Outlook

13. Efficiency Indicators

- ❖ Efficiency Indicators for Freight Operations
 - NTKM Per Wagon Per Day
 - Wagon Km Per Wagon Per Day
 - Freight Train Engine Km
 - Average Net Load of Freight Trains
 - Wagon Turn Around Time
 - Average Load Per Wagon
 - Ineffective Percentage of Rolling Stock
- ❖ Passenger Km Per Route Km
- ❖ Line Capacity and Utilisation
- ❖ Staff Utilisation Indicators
- ❖ New Initiatives & Future Plans

SECTION IV: FOCUS ON KEY SEGMENTS

14. Track Construction: Progress so Far

- ❖ Current Size and Growth Trends (2016-17 to 2020-21)
 - New Lines
 - Doubling/Tripling
 - Gauge Conversion
 - Bridges
 - Tunnels
- ❖ Key Completed Projects
- ❖ Key Ongoing Projects
- ❖ Equipment & Material Trends
- ❖ Zone-wise Progress

15. Opportunities in Track Construction

- ❖ Network Expansion Plans & Targets
 - Short-Term (2021-22)
 - Medium-Term (2024-25)
 - Long-Term (2025 and beyond)
- ❖ Projects Proposed in 2021-22
 - New Lines
 - Doubling/Tripling
 - Gauge Conversion
 - Tunnels
 - Bridges
- ❖ Zone-wise Plans & Targets
- ❖ Demand Projections (Till 2026-27)
 - Equipment (Excavators, Loaders, Cranes, etc.)
 - Materials (Steel, Aluminium, Cement, etc.)
- ❖ Upcoming Tenders and Contracts
- ❖ Future Investment Requirements

16. Rolling Stock: Current Fleet & Future Production Plans

- ❖ Growth Trends versus Targets (2016-17 to 2020-21)
 - Coaches
 - Locomotives
 - Wagons
- ❖ Production Plans & Targets
 - 2021-22
 - 2022-23
- ❖ New Trains Introduced
- ❖ Innovation in Designs & Components
- ❖ Future Investment Requirements

17. Production Capacity: Current & Expansion Plans

- ❖ Existing Production Capacity
- ❖ Actual Production versus Target (2016-17 to 2020-21)
- ❖ Technology & Advancements
- ❖ Upcoming Production Units
- ❖ Opportunities under Make in India & Atmanirbhar Bharat
- ❖ Investment Requirements

18. Signalling & Telecommunication

- ❖ Current Size and Growth Trends (2016-17 to 2020-21)
 - Signalling
 - Telecommunications
- ❖ Zone-wise Plans & Targets
- ❖ Expenditure Trends (2016-17 to 2020-21)

- ❖ New Technologies & Innovation
- ❖ Opportunities under Make in India & Atmanirbhar Bharat
- ❖ Equipment Demand Projections (till 2026-27)
- ❖ Upcoming Tenders and Contracts
- ❖ Future Investment Requirements (Till 2026-27)

19. Railway Electrification

- ❖ Growth Trends versus Targets (2016-17 to 2020-21)
- ❖ Projects Proposed in 2021-22
- ❖ Zone-wise Plans & Targets
- ❖ Trends in Energy Consumption and Expenditure
- ❖ Initiatives to Reduce Traction and Non-Traction

Consumption

- ❖ Transmission Network
- ❖ New Captive Power Plants
- ❖ Targets & Plans for Net Zero Carbon Emission
- ❖ Focus on Renewable Energy
 - Current Capacity
 - Key Ongoing Projects
 - Key Upcoming Projects
 - Upcoming Contracts & Tenders

SECTION V: KEY PROFILES

20. Profiles of Zonal Railways

- ❖ Central Railway
- ❖ East Coast Railway
- ❖ East Central Railway
- ❖ Eastern Railway
- ❖ North Central Railway
- ❖ North Eastern Railway
- ❖ Northeast Frontier Railway
- ❖ Northern Railway
- ❖ North Western Railway
- ❖ South Central Railway
- ❖ South East Central Railway
- ❖ South Eastern Railway
- ❖ Southern Railway
- ❖ South Western Railway
- ❖ West Central Railway
- ❖ Western Railway

This section will operational performance, financial performance, key completed projects, key ongoing projects, upcoming projects, new initiatives and future plans of railway zones.

21. Key PSU Profiles

- ❖ Container Corporation of India Limited
- ❖ Dedicated Freight Corridor Corporation of India Limited
- ❖ High Speed Rail Corporation of India Limited
- ❖ Indian Port Rail Corporation Limited
- ❖ Indian Railway Finance Corporation Limited
- ❖ Indian Railway Catering and Tourism Corporation Limited
- ❖ Ircon International Limited
- ❖ Konkan Railway Corporation Limited
- ❖ Mumbai Railway Vikas Corporation Limited
- ❖ National High Speed Rail Corporation Limited
- ❖ Pipavav Railway Corporation Limited
- ❖ Rail India Technical and Economic Services Limited
- ❖ Rail Land Development Authority
- ❖ RailTel Corporation of India Limited
- ❖ Rail Vikas Nigam Limited

This section will cover operations, financial performance, recent developments, project portfolio, and future plans of key PSUs.

Monthly Updates

The 11 monthly updates will comprise 16-24 pages on:

- Analysis of Traffic and Earnings
- Performance of Production Units
- Key Efficiency Indicators
- Project Update
- Upcoming Tenders
- New Project Announcements (New Lines, DFC, High-Speed Rail, RRTS, Station Redevelopment, etc.)
- Key Data and Statistics

Weekly Newsletters

The 52 weekly newsletters will comprise 4-6 pages. It will cover news developments in the railways sector relating to:

- Policy Announcements
- Government Initiatives
- Project Completions/Awards/Announcements
- Update on Key Programmes
- Key Financings
- Etc.

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