

India Road & Highways Sector Opportunity Analysis

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Abstracts

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India's road network at a primary level includes national highways while the secondary system is made up of state highways and major district roads. Extending the road system further are the rural and other roads apart from expressways. Of these the National Highways (NH) are handled by the central government while the state highways (SH) are in the hands of the state government. Other types of roads include the major district roads (MDR) and other district roads & rural roads that are handled by the state and local government respectively. In terms of ownership and construction the roads in India can be classified as Maintained by PWD, panchayat raj roads, JRY and PMGSY Roads, urban roads and project roads.

As of March 2015, India's network of National Highways/Expressway was about 96,214 km. The network of state highways stretched 1,47,800 km, while other roads were about 44,55,000 km out of a total of 46,99,014 km of roads and highways. National highways thus make about 2% of the total road length, the state highways about 3% with the other roads making up nearly 95%. The roads sector saw significant investment growth during the 11th FYP. Overall investment grew by 3.5 times compared to the 10th FYP, reaching INR 5.16 Lakh Crore. Roads made up about 20% of overall infrastructure investments in the 11th FYP, growing 8% from the numbers in the 10th FYP. The actual investment in roads during the 11th FYP was 10% higher than planned, due to an increase in central-government spending on rural road programs (Pradhan Mantri Gram Sadak Yojana) and state investments.

The 12th five year plan serves as the reference point for the growth in the market and projections about it with respect to road infrastructure. The 12th plan has the objective of improving mobility and accessibility while reducing the cost of transportation. The main target of the 12th five year plan is the completion of the ongoing phases of NHDP-

I, II, III and V involving upgradation to 4 or more lanes of about 32,750 km. This includes overlapping length of about 5,850 km under GQ and NHDP-V, in a time bound manner within the plan period. About 10,000 km of roads are to be added to the national highways during the twelfth plan so that the total length of the highways becomes 91,200 km.

The government has plans to attract funding from the private sector for infrastructure projects to reduce strains on the budget. In this respect the PPP model has emerged as a preferred one for private sector participation in road projects and there have been about 100 completed PPP projects and 165 PPP projects that are in progress. For national highways that are not viable on Public-Private Partnership (PPP) basis the Ministry of Road Transport and Highways has decided to adopt the Engineering Procurement and Construction (EPC) mode. About 20,000 km of 2-lane National Highways projects are to be constructed through EPC mode in the Twelfth Five Year Plan.

“India Road & Highway Sector Investment Opportunity Analysis” Report Highlights

India Road & Highway Sector Overview & Network Analysis

Planned & Under Construction Highway & Expressway Infrastructure

Toll Collection Mechanism: Opportunities & Challenges

India Road & Highway Sector Investment Scenario

FDI Policy & Government Initiatives

PPP in Roads & Highway Infrastructure Development

Project Sourcing & Financing

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COMPANIES

Ashoka Buildcon, Gayatri Projects, GMR Infrastructure, TATA Projects, Hindustan Construction Company, IL&FS Transportation Networks, IRB Infrastructure Developers, Jaypee Infratech, KMC Constructions, Larsen & Toubro, Navayuga Engineering Company, NCC, Reliance Infrastructure

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