8th Urban Mobility India Conference & Expo 2015
Transforming Mobility for Liveability

"INTERCITY PASSENGER AND FREIGHT TRANSPORT: CURRENT POLICIES FOR PROMOTING RAIL"

26TH NOVEMBER, 2015

By

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FACTORS PROMOTING PASSENGER TRAVEL DEMAND

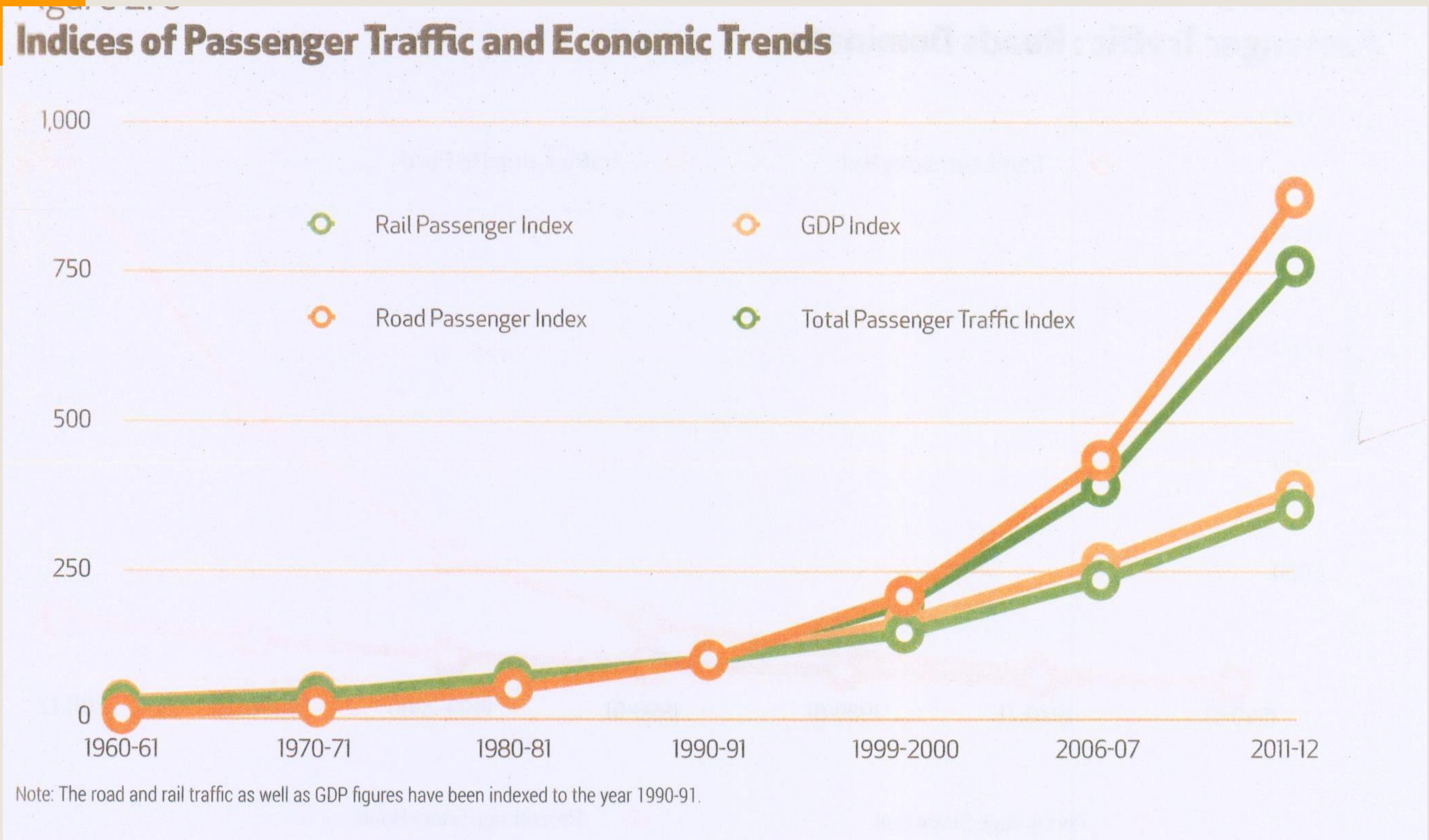
- ***Large Population (1.25 billion)***
- ***Growth in GDP***
- ***Increasing urbanisation (31%) – More than 50 million plus cities***
- ***Steadily Increasing disposable incomes***
- ***Internal migration***

LEVEL AND GROWTH OF LAND BASED PASSENGER MOBILITY

Year	Absolute Mobility (BPKM)	Per Capita Mobility (KM)
1950-51	102	285
1960-61	171	395
1970-71	358	661
1980-81	794	1,169
1990-91	1,783	2,125
2000-01	3,536	3,470
2010-11	7,817	6,620
2020-21	12,987	9,770

Source: Sanjay Singh

Indices of Passenger Traffic and Economic Trends



PROJECTED DEMAND FOR PASSENGER TRANSPORT PASSENGER (BPKM)

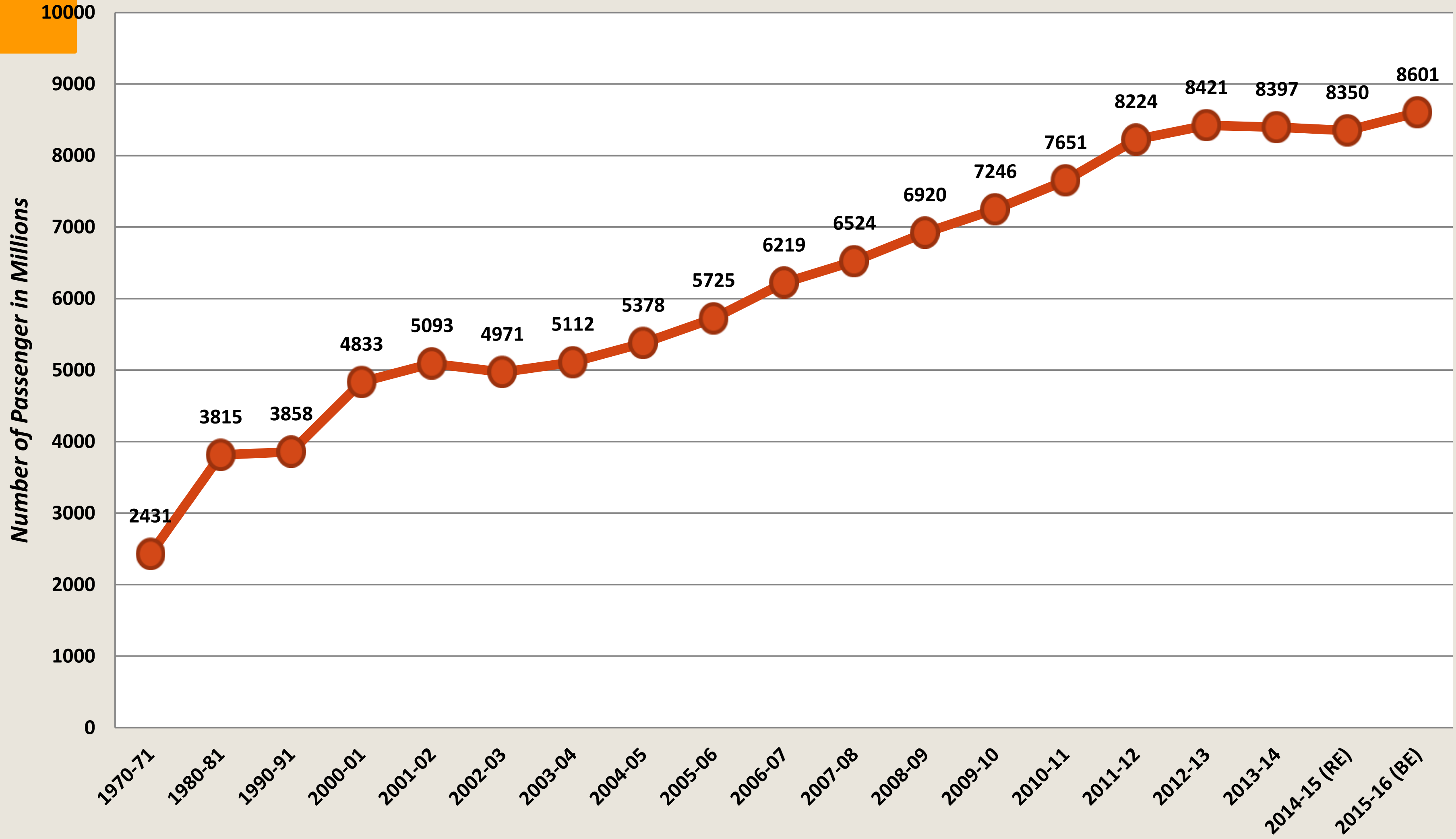
Year	Road	Rail	Air	Total
2005	3,041 (84%)	576* (16%)	18 (0%)	3,635
2010	5,240 (85%)	903* (15%)	44 (1%)	6,187
2015	7,227 (85%)	1222 (14%)	73 (1%)	8,522
2020	10,146 (85%)	1740 (14%)	117 (1%)	12,003
2025	13,222 (84%)	2325 (15%)	176 (1%)	15,723
2030	16,277 (84%)	2904 (15%)	256 (1%)	19,437
CAGR (2005-2030)	**7%**	**7%**	**11%**	**7%**

* Actuals; Sources: Indian Railways Statistical Statements, DGCA. Report of the Expert Group on Low Carbon Strategies for Inclusive Growth

PASSENGER BUSINESS OF INDIAN RAILWAYS

- ***Indian Railways operate 20,000 trains per day – 7500 freight and 12500 passenger***
- ***Passenger has multiple segments- commuter, passenger, intercity, long-distance***
- ***Supply side constraints : 300 plus highly popular trains which get booked within minutes of reservation being opened; are overbooked throughout the year***
- ***Constraints of Capacity: sectional capacity; terminal capacity; peak/off peak***

PASSENGER ORIGINATING (TOTAL)



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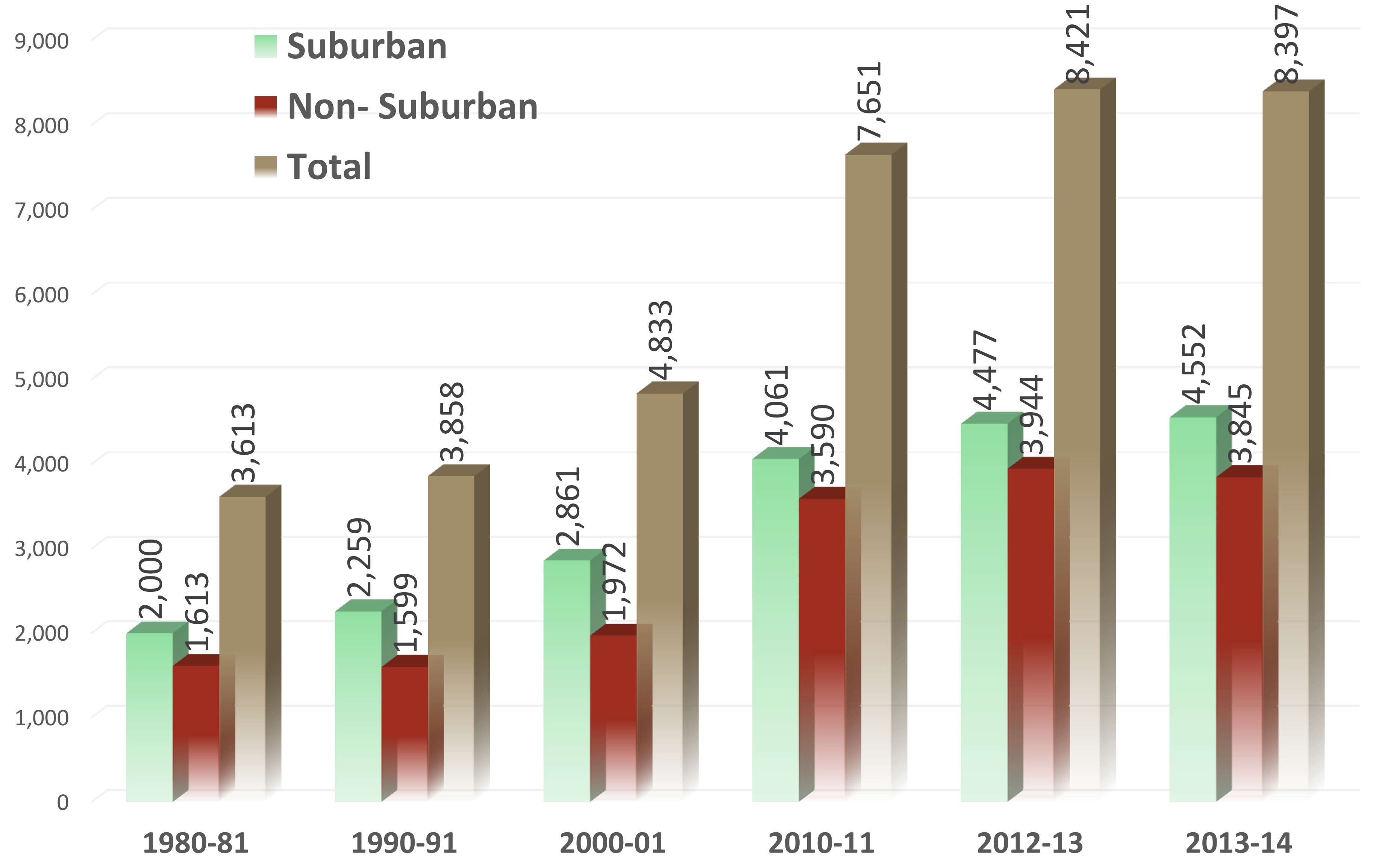
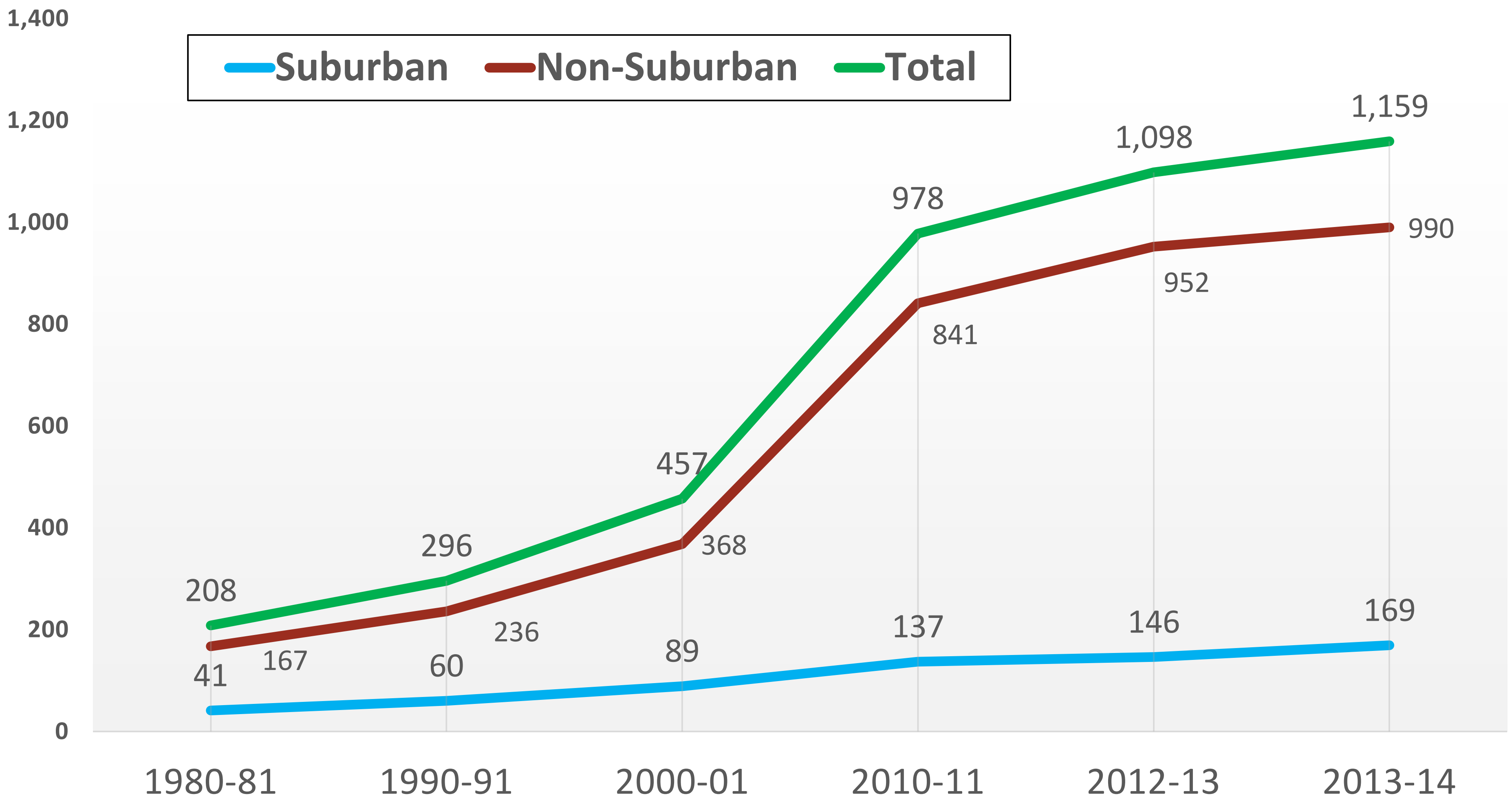
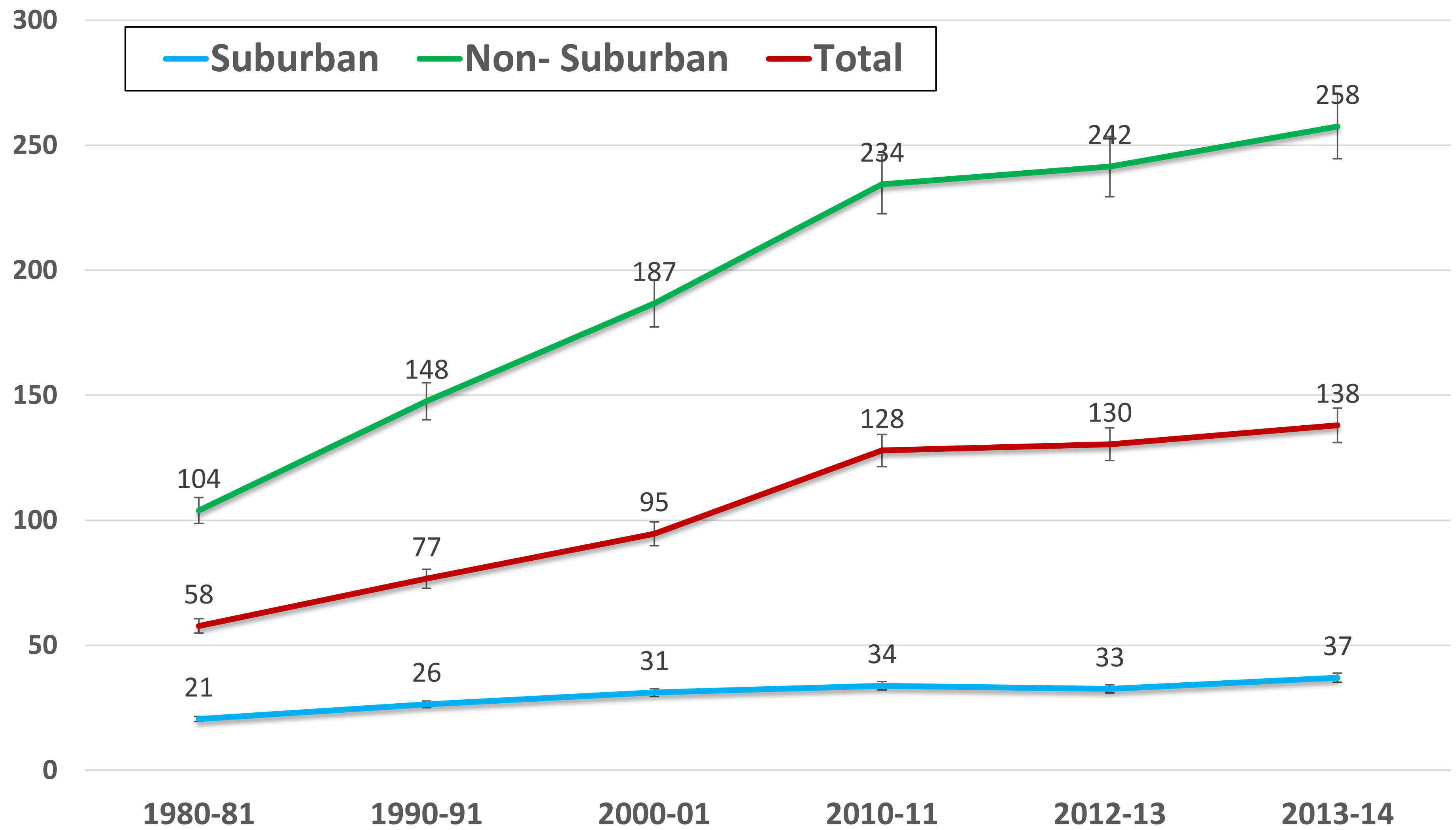
PASSENGERS ORIGINATING (Million)



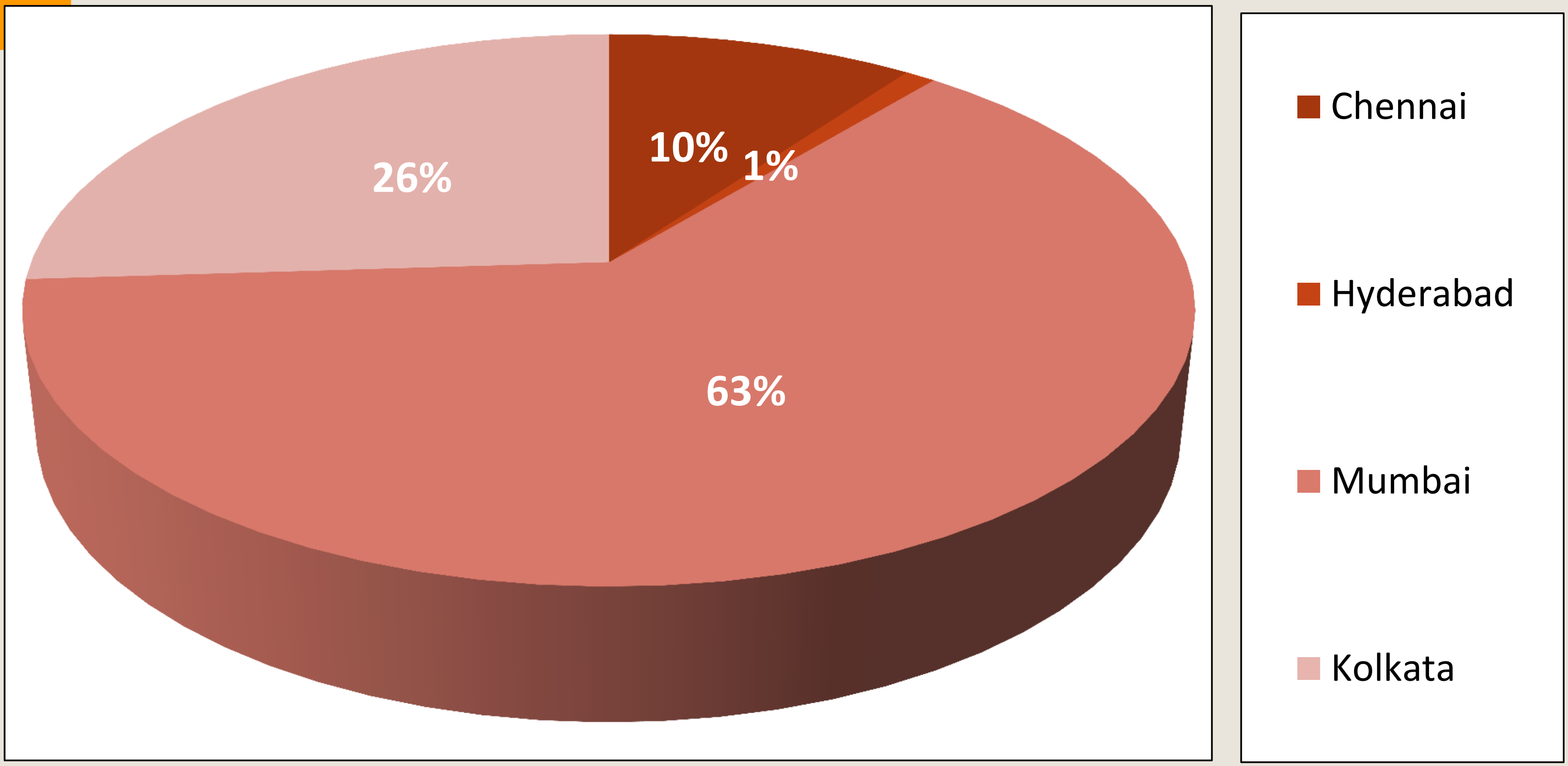
PASSENGER KMS. (BILLION)



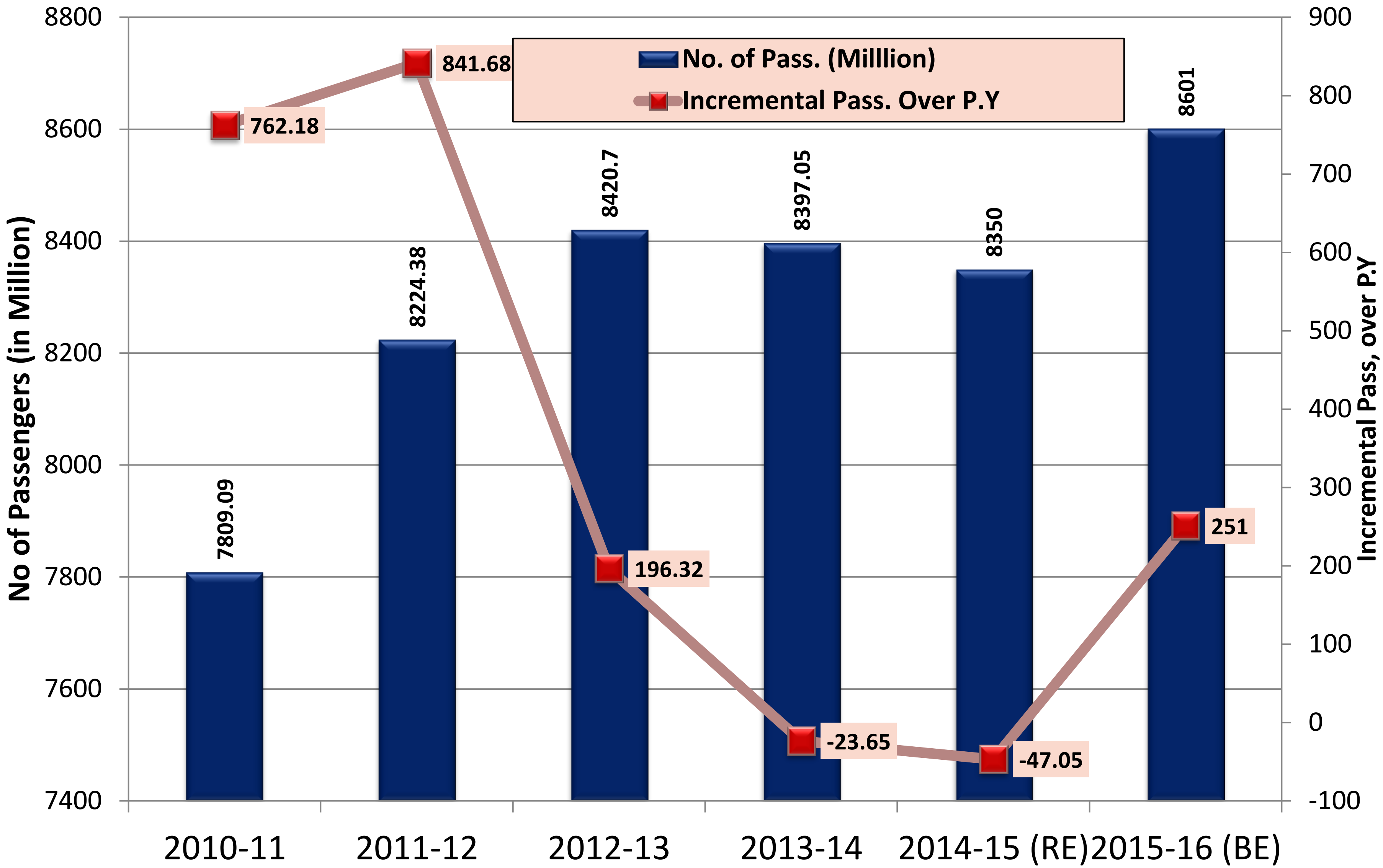
AVERAGE DISTANCE TRAVELLED PER PASSENGER (KMS.)



DISTRIBUTION OF SUBURBAN TRAFFIC



NUMBER OF ORIGINATING PASSENGERS

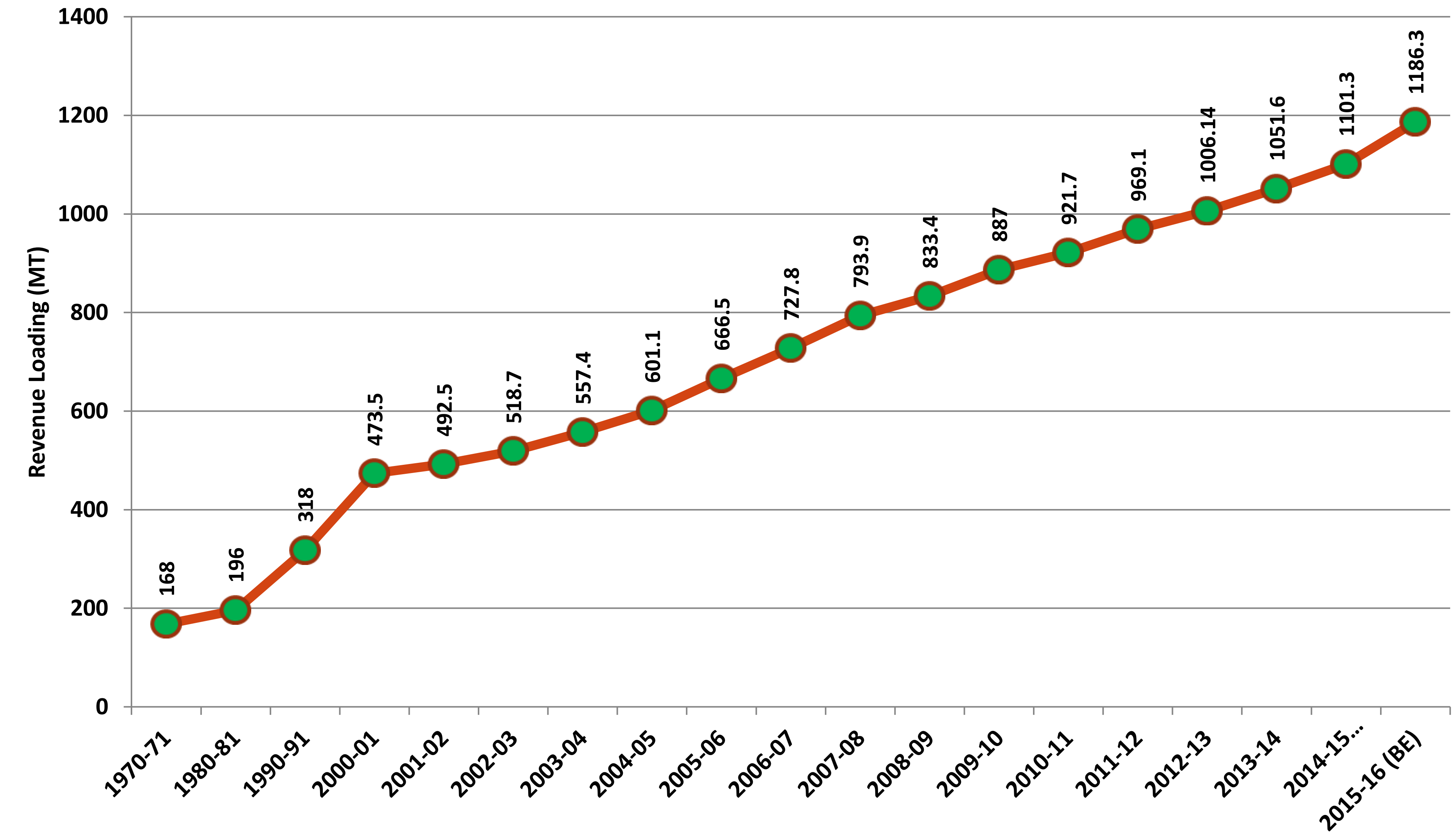


SHARE OF VARIOUS MODES OF FREIGHT TRANSPORT (VALUE IN %)

Year	Road	Rail	Air
2005	57.16	42.82	0.02
2010	58.29	41.69	0.02
2015	60.51	39.47	0.02
2020	63.18	36.79	0.02
2025	65.67	34.30	0.02
2030	67.65	32.32	0.02

Report of the Expert Group on Low Carbon Strategies for Inclusive Growth

ORIGINATING REVENUE LOADING



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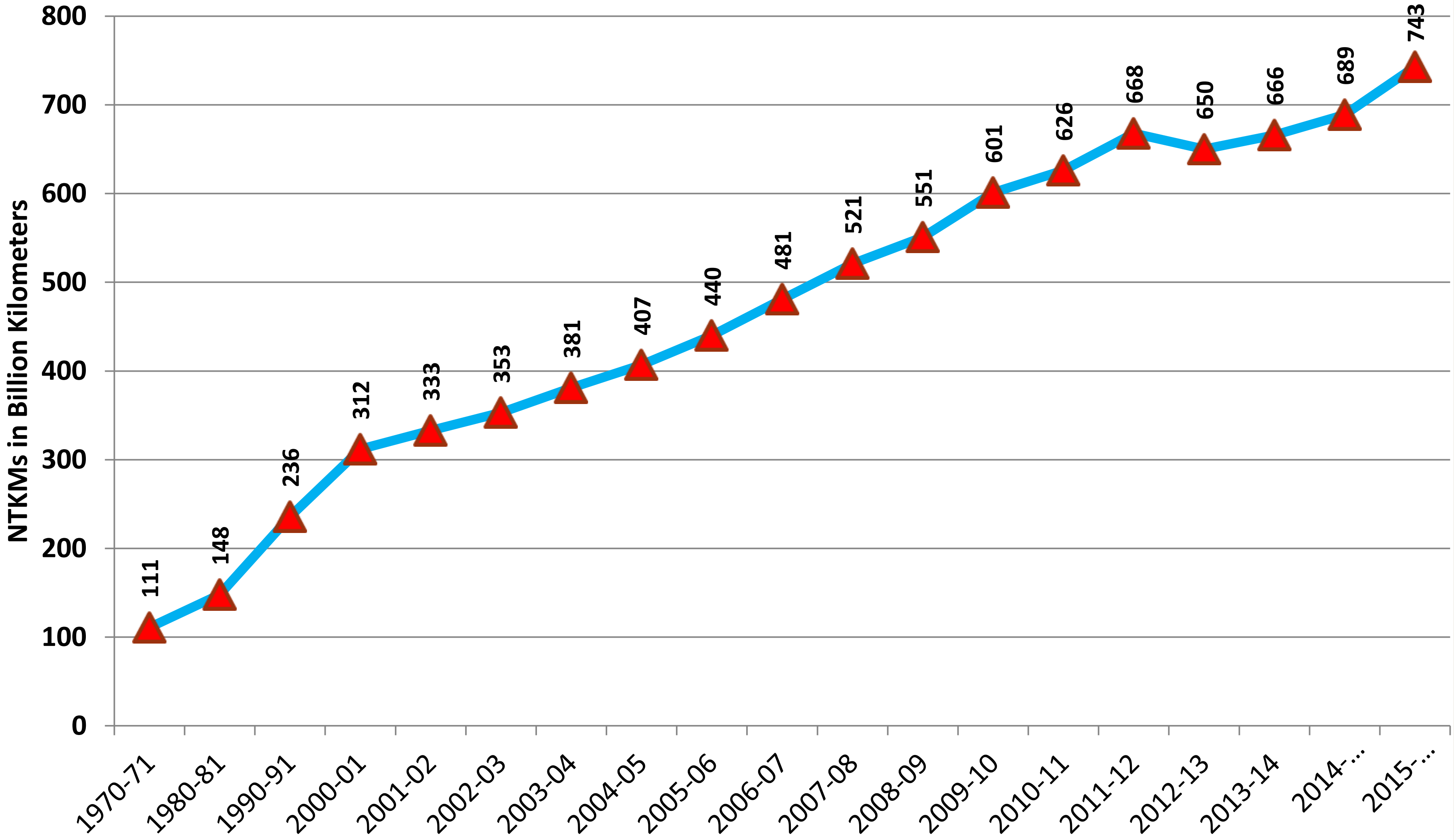
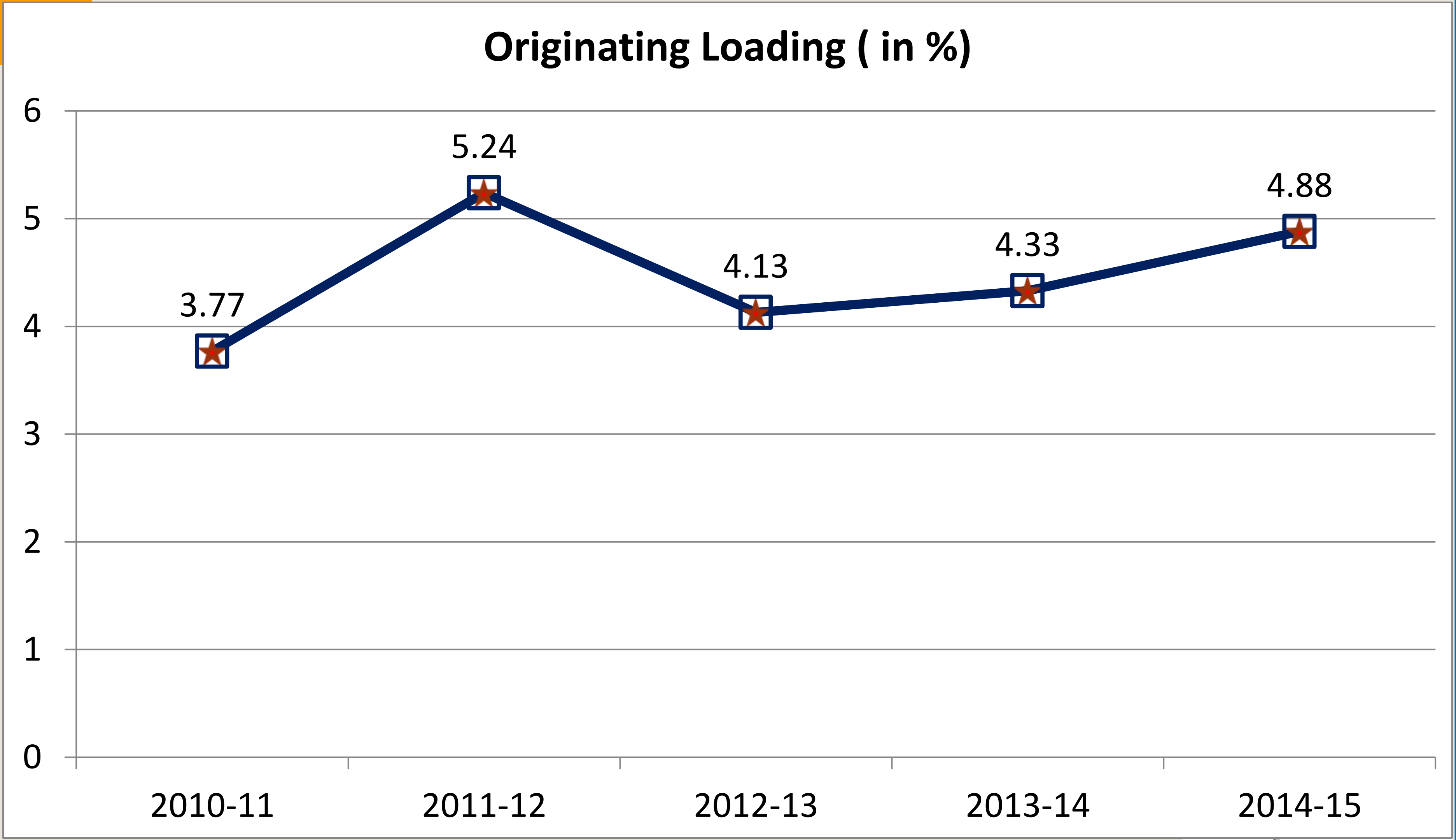
NET TONNE (KM FREIGHT)



PERCENTAGE GROWTH IN ORIGINATING LOADING YoY



POLICY STATEMENT

Unfortunately, Railway facilities have not improved very substantially over the past few decades. A fundamental reason for this is the chronic underinvestment in Railways, which has led to congestion and overutilization. As a consequence, capacity augmentation suffers, suffers, safety is challenged and the quality of service delivery decline, leading to poor moral, reduced efficiency, sub-optimal freight and passenger traffic, and fewer financial resources. This again feeds the vicious cycle of under investment.

Source: Railway Budget Speech, 2015-16.

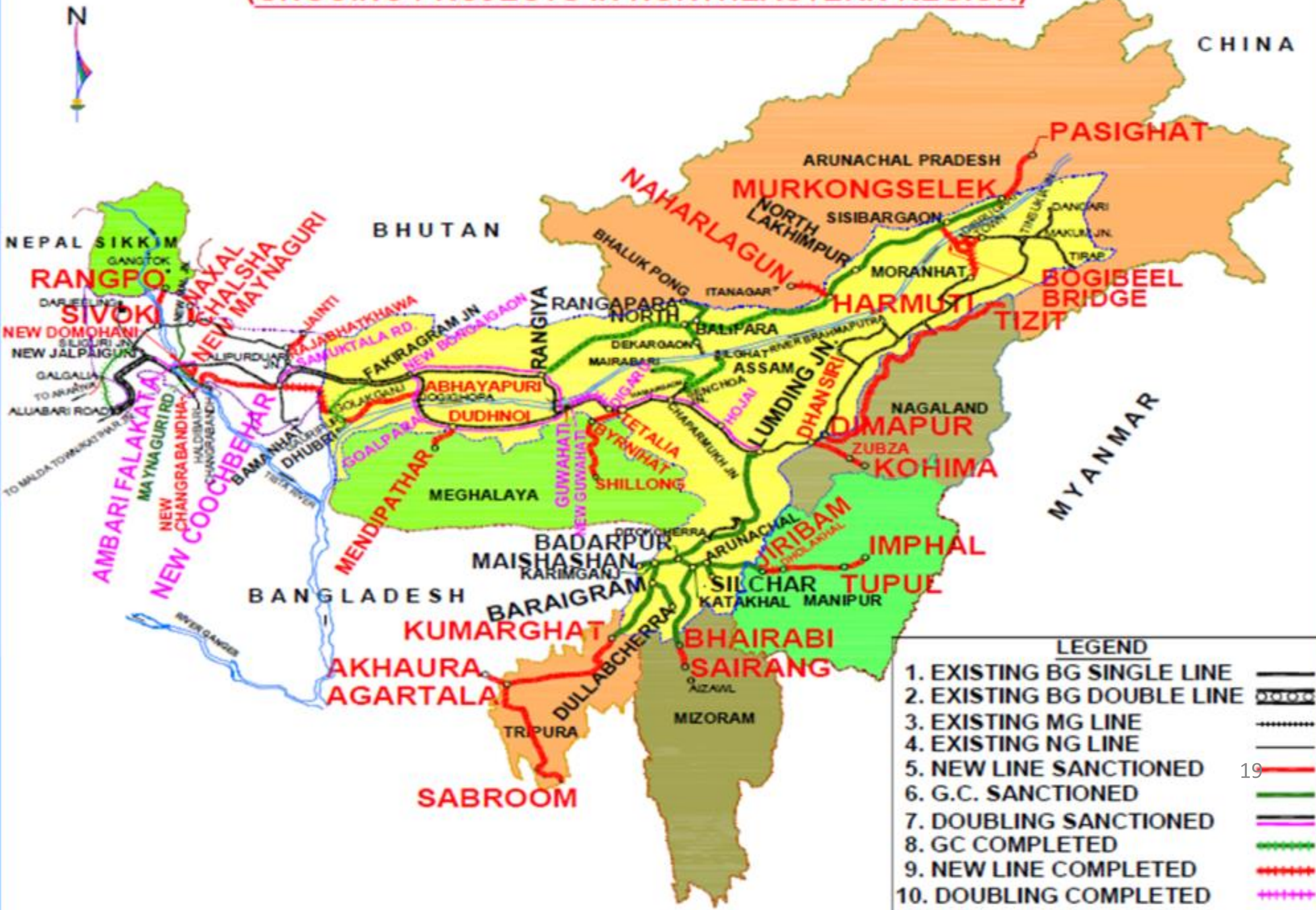
Expert Group Recommendation

If consistent economic growth of 7-10 per cent per annum is to be achieved over the next 20 years, there is a pressing need for unprecedented capacity expansion of the railways for both freight and passenger traffic in a manner that has not taken place since Independence.

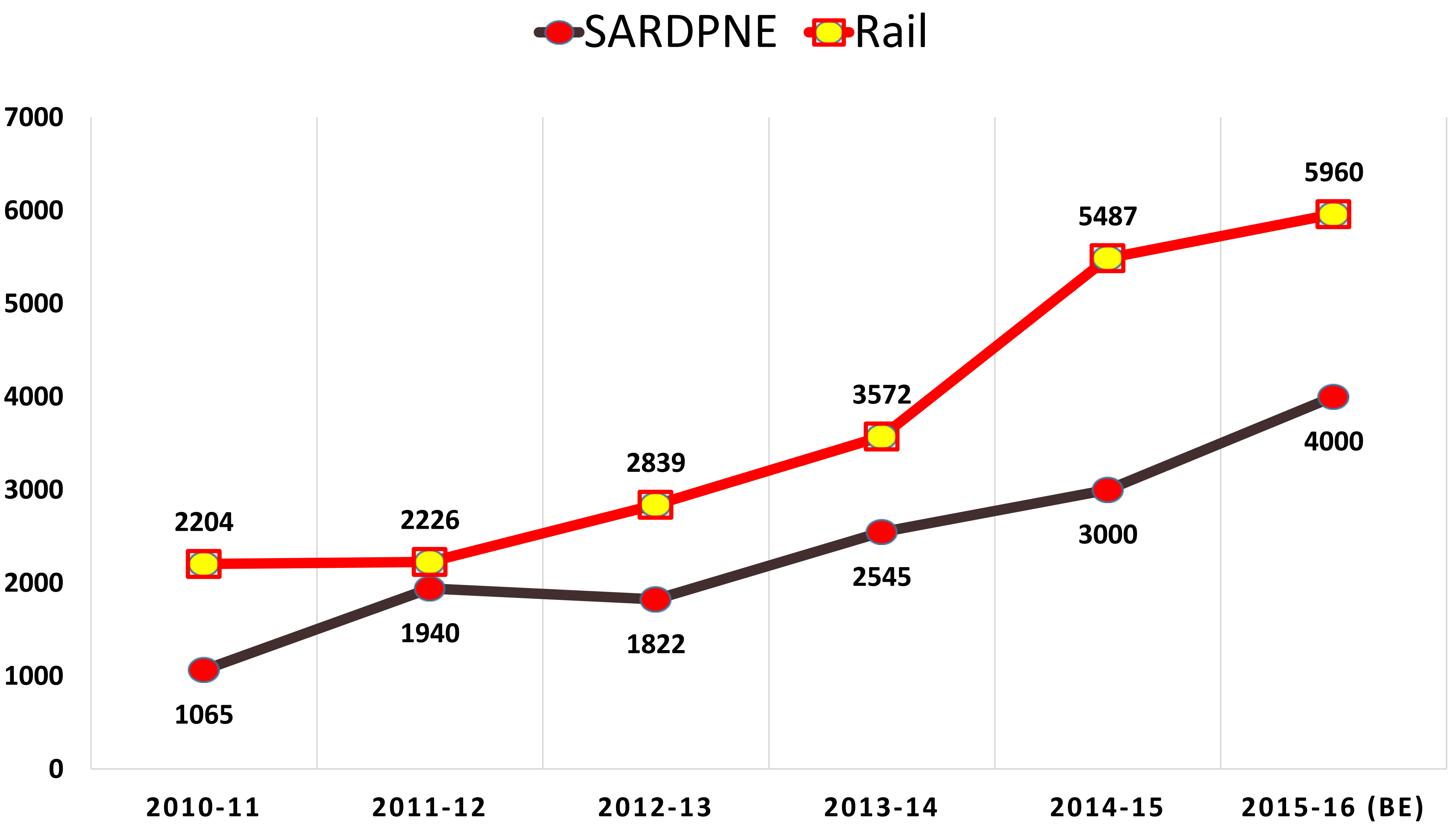
National Transport Development Policy Committee (2014)

MASTER PLAN FOR THE DEVELOPMENT OF RAIL INFRASTRUCTURE IN THE NORTHEAST REGION

(ONGOING PROJECTS IN NORTHEASTERN REGION)

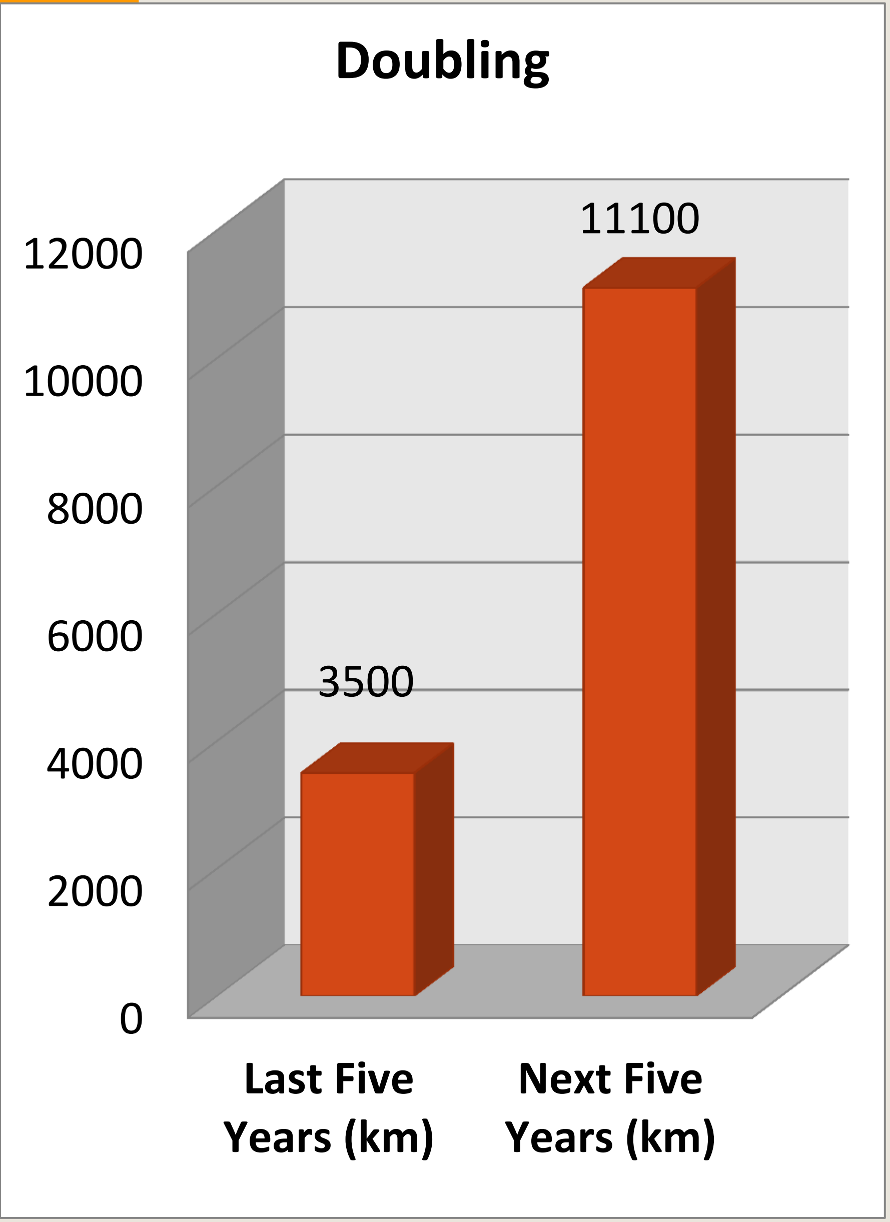


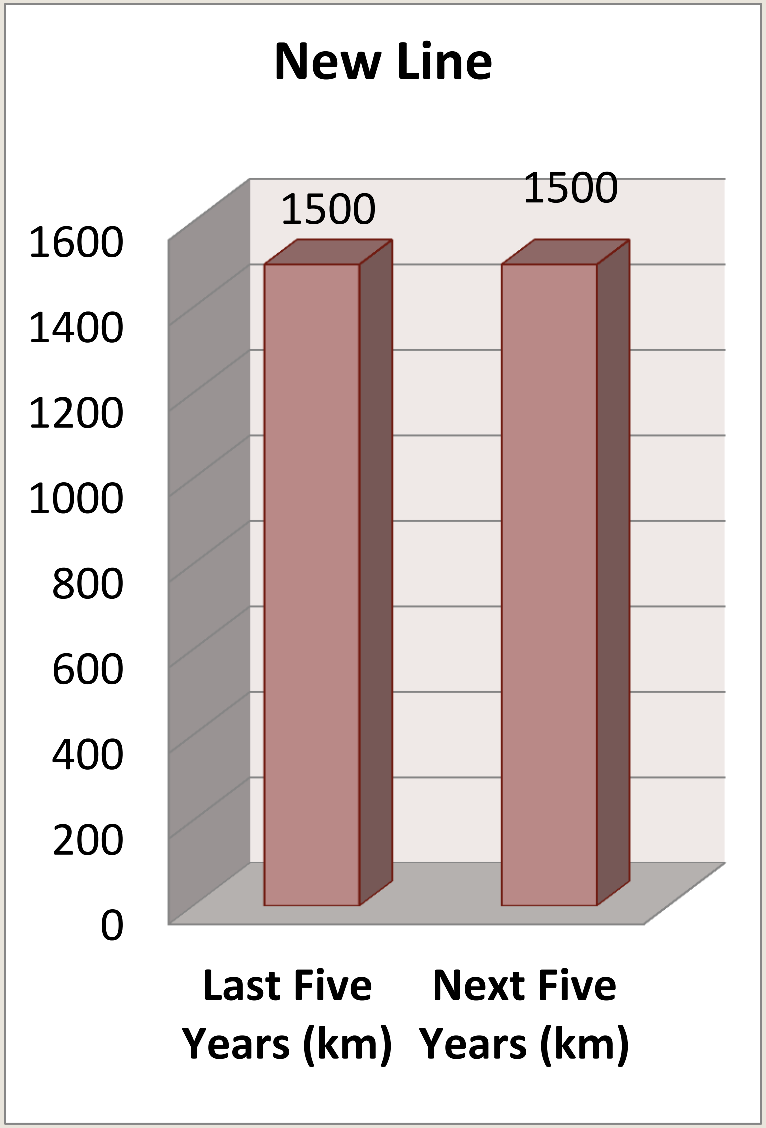
Expenditure Incurred on SARDPNE and Rail Projects in the North East: Impact of Accelerated Funding



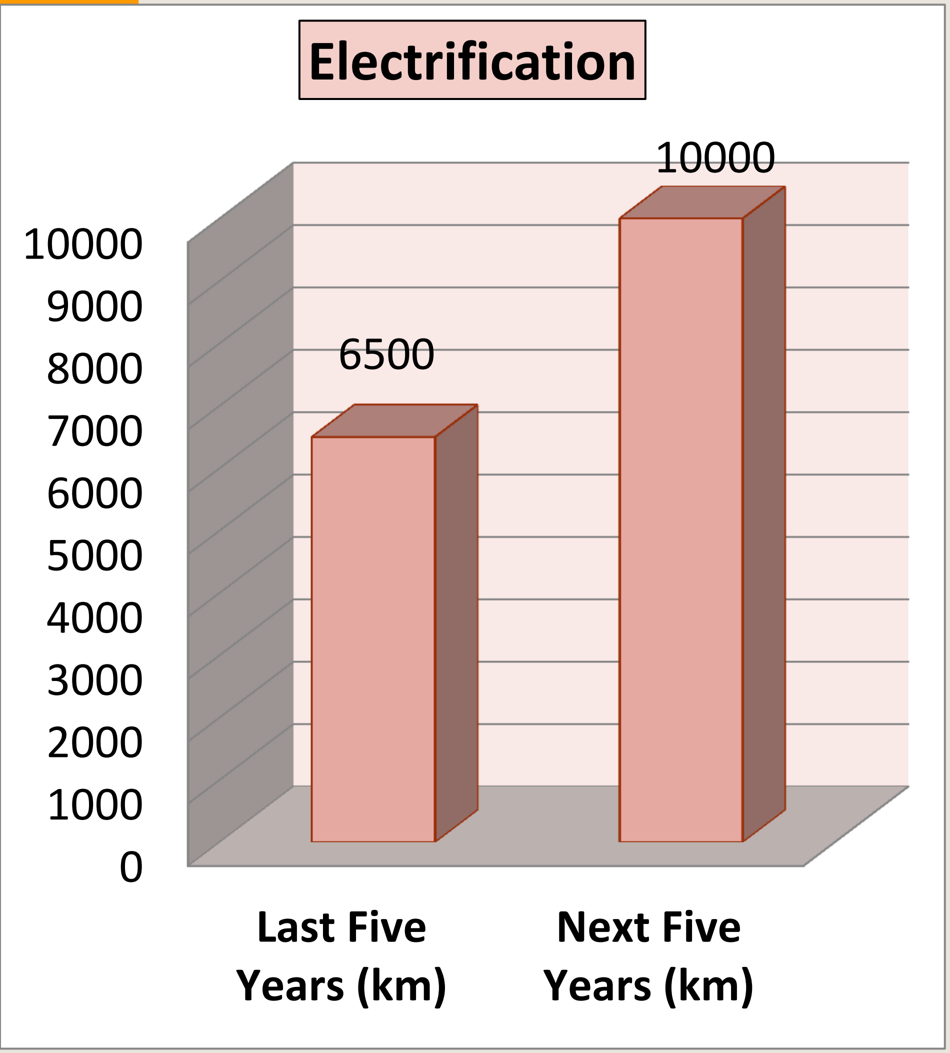
CONCEPT PLAN OF DEDICATED FREIGHT CORRIDOR NETWORK

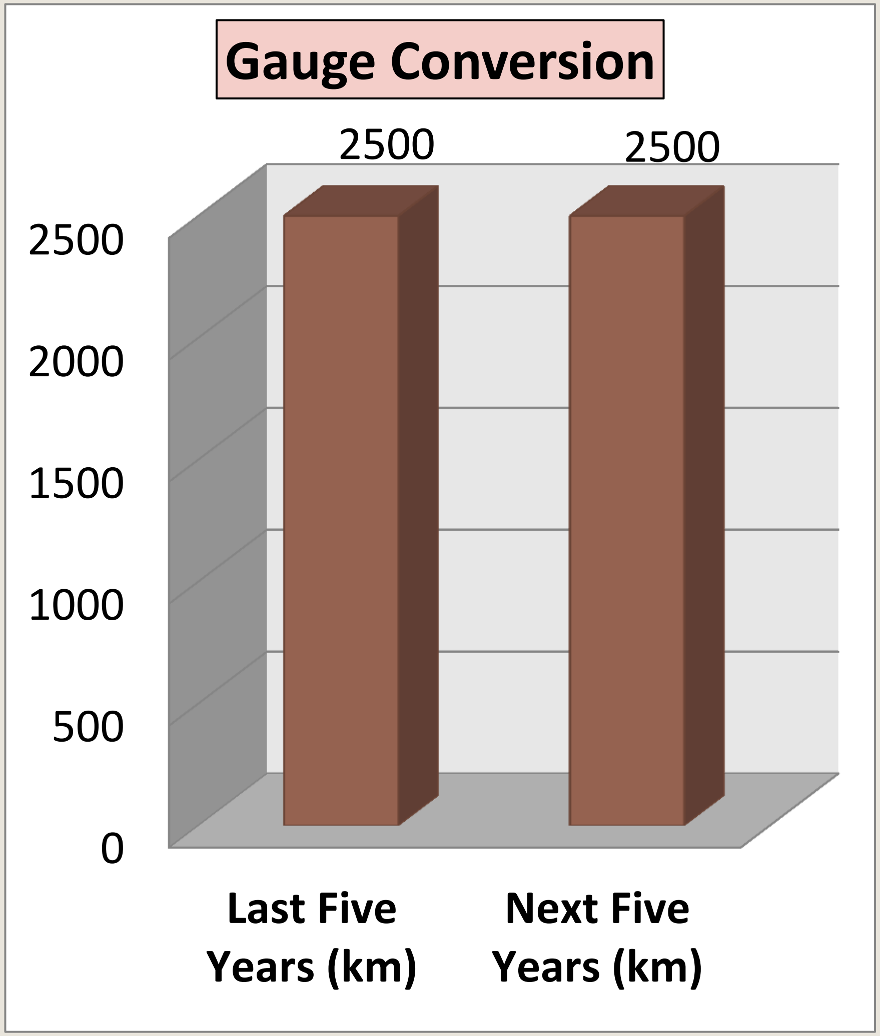
Rail: Thrust Areas for Next 5 Years



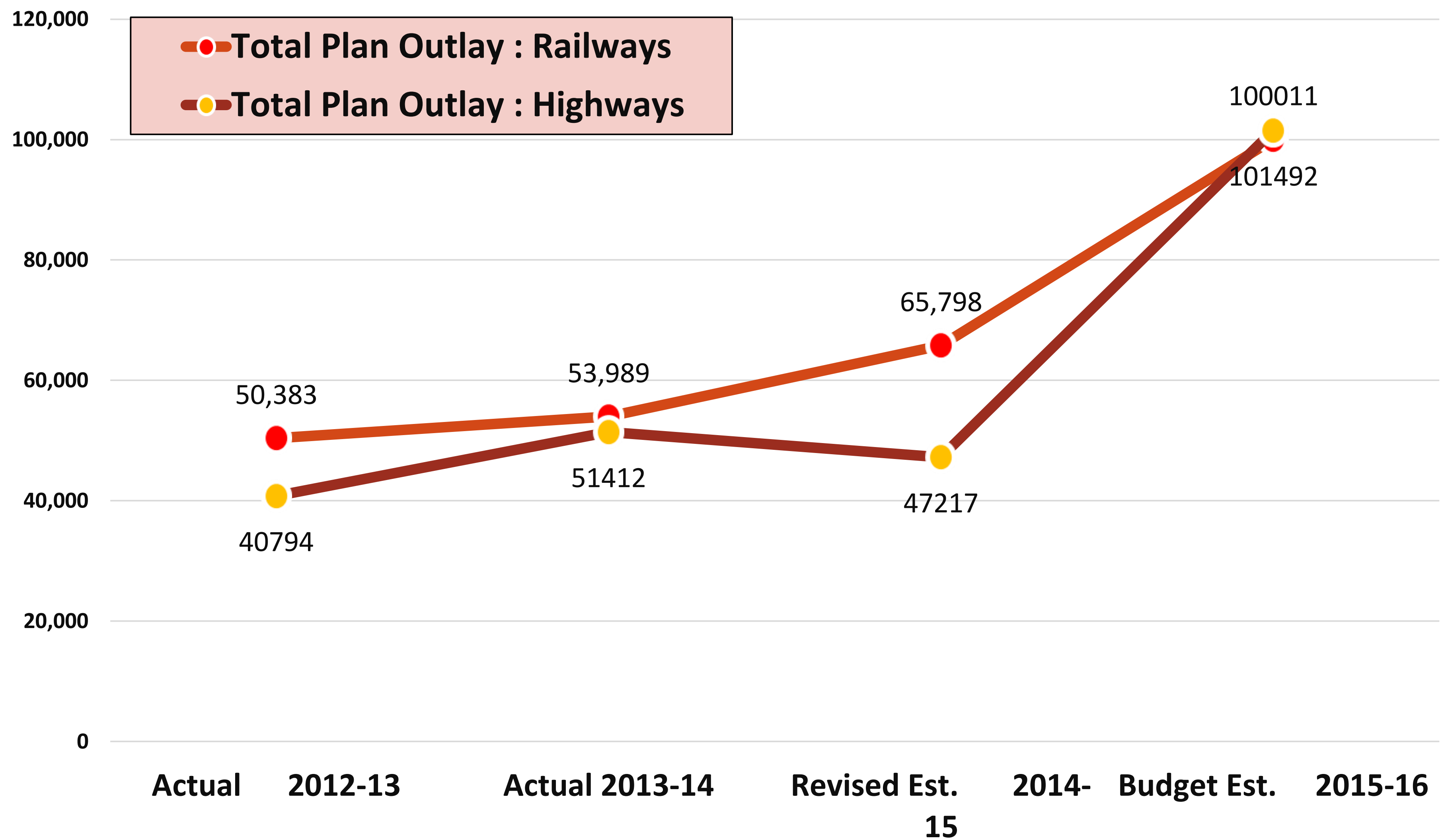


Rail: Thrust Areas for Next 5 Years





Investments in Transport Sector: Railways and Highways



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PASSENGERS ORIGINATING (Million)

Year	Suburban	Non-Suburban	Total
1980-81	2,000	1,613	3,613
1990-91	2,259	1,599	3,858
2000-01	2,861	1,972	4,833
2010-11	4,061	3,590	7,651
2012-13	4,477	3,944	8,421
2013-14	**4,552**	**3,845**	**8,397**

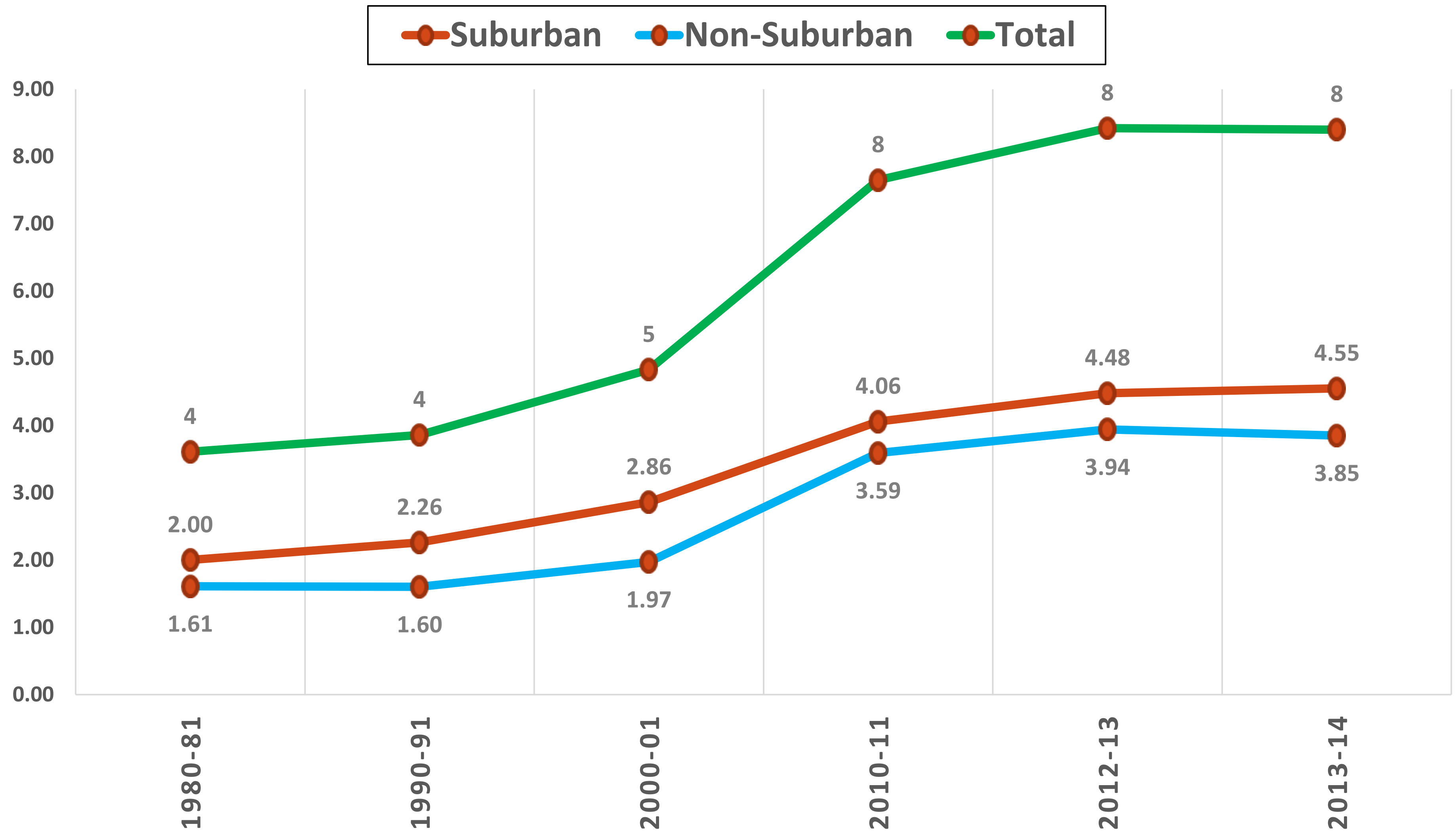
AVERAGE DISTANCE TRAVELLED PER PASSENGER (KMS.)

Year	Suburban	Non-Suburban	Total
1980-81	20.5	103.9	57.7
1990-91	26.4	147.6	76.6
2000-01	31.1	186.7	94.6
2010-11	33.8	234.4	127.9
2012-13	32.5	241.5	130.4
2013-14	**37**	**257.5**	**138**

AVERAGE DISTANCE TRAVELLED PER PASSENGER (KMS.)

Year	Suburban	Non-Suburban	Total
1980-81	41,086	167,472	208,558
1990-91	59,578	236,066	295,644
2000-01	88,872	368,150	457,022
2010-11	137,127	841,381	978,508
2012-13	145,654	952,449	1,098,103
2013-14	**168,589**	**990,153**	**1,158,742**

PASSENGERS ORIGINATING (Billion)



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PROJECTED DEMAND FOR PASSENGER TRANSPORT FREIGHT (BTKM)

Year	Road	Rail	Air	Total
2005	549 (57%)	411* (43%)	0* (0%)	961
2010	841 (58%)	601* (42%)	0* (0%)	1,442
2015	1,186 (60%)	774 (39%)	0 (0%)	1,961
2020	1,918 (63%)	1,117 (37%)	1 (0%)	3,035
2025	3,020 (66%)	1,578 (34%)	1 (0%)	4,599
2030	4,517 (68%)	2,158 (32%)	2 (0%)	6,677
CAGR (2005-2030)	**9%**	**7%**	**8%**	**8%**

*** Actuals; Sources: Indian Railways Statistical Statements, DGCA.**

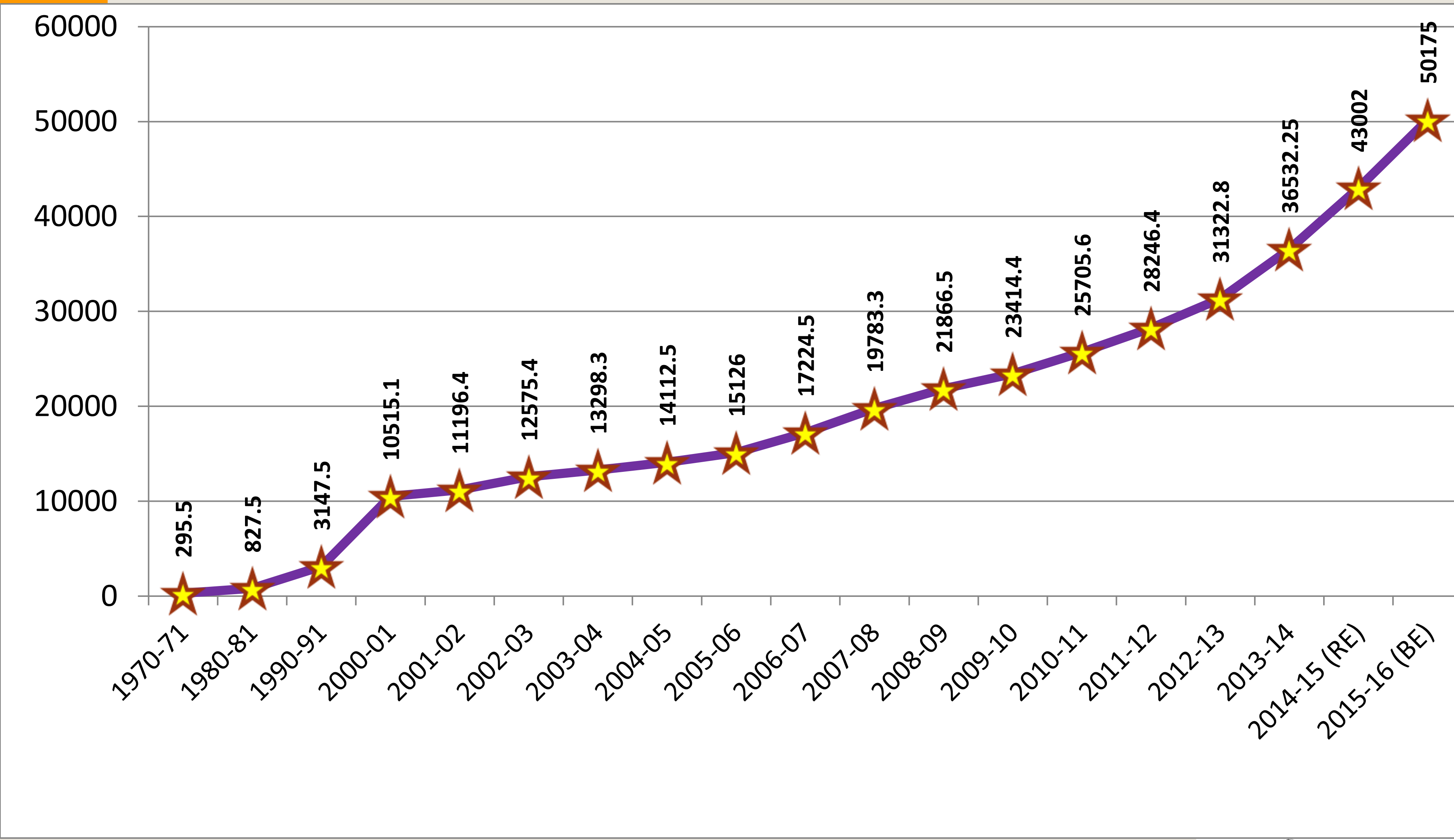
SHARE OF VARIOUS MODES – PASSENGER KILOMETRES (VALUE IN %)

Year	Road	Rail	Air
2005	0.84	15.84	0.50
2010	84.69	14.60	0.71
2015	84.81	14.34	0.85
2020	84.53	14.50	0.97
2025	84.09	14.79	1.12
2030	83.09	14.94	1.32

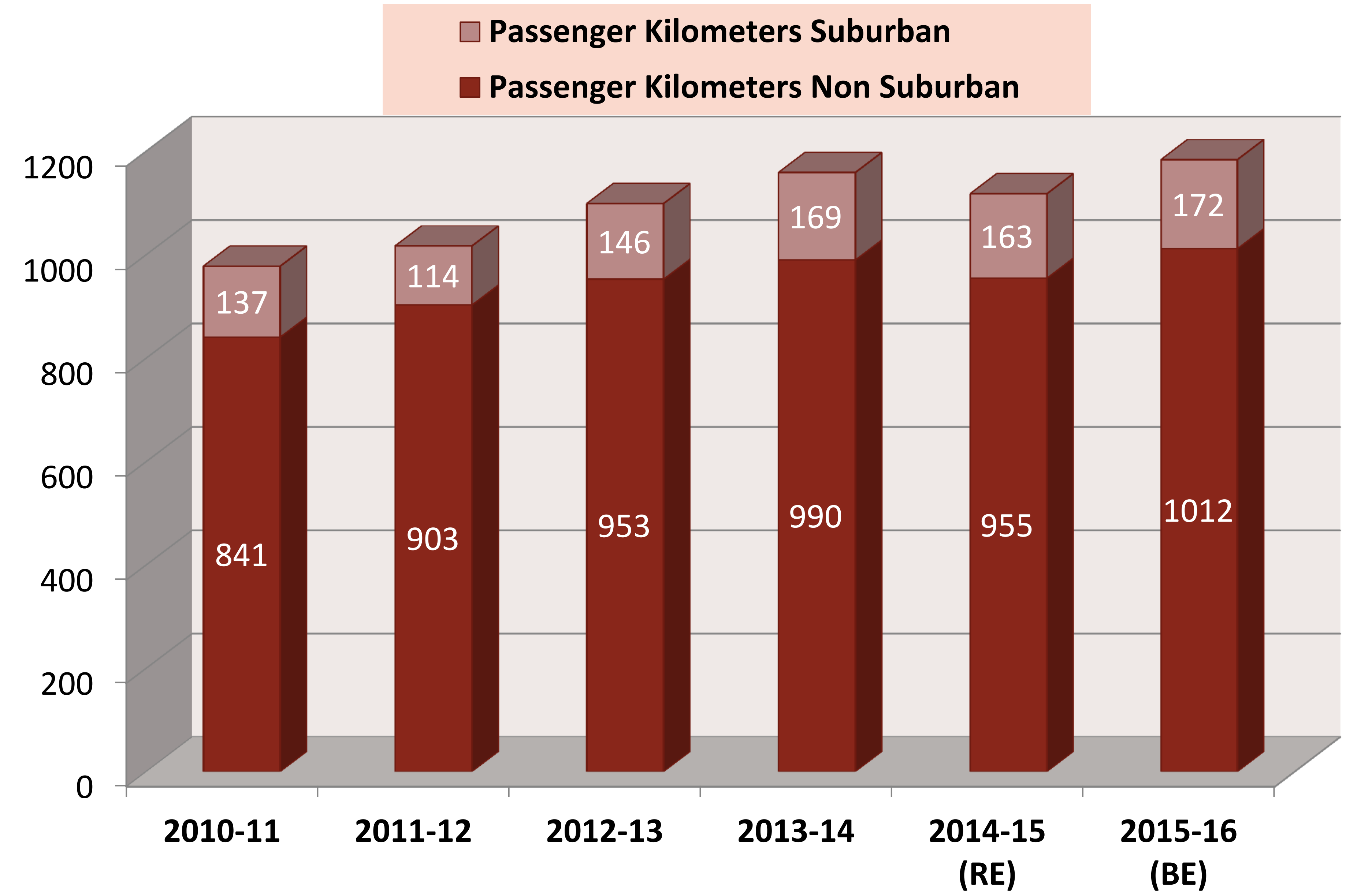
Thrust on Capacity Enhancement

S. No.	Parameter	Achievement 2014-15	Target for Completion 2015-16	Target for Completion Upto 2020
1	New Line (KMS)	313 (104%)	300	1,900
2	Doubling (KMS)	705 (101%)	1,200	11,100
3	Gauge Conversion (KMS)	527 (117 %)	500	3,700
4	Electrification (Route KM)	1375 (106%)	1600	10,000

PASSENGER EARNINGS (RS. IN CRORE)



PASSENGER KILOMETERS



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