



The outcome of India's general election could shape the fate of trenchless projects for the next five years. Professor Dr Niranjan Swarup (above), executive director of the Indian Society for Trenchless Technology, talks to TW

A roadmap for one billion

Movements in the Indian trenchless market in 2013 were steady with fewer new projects being declared than in earlier years. The prime cause is the slowing of India's economy, leading to delays in investment decisions and hampering the movements in construction industry.

Due to this slowdown, the year saw certain consolidations and the advent of larger operations, on both equipment and company fronts, with the exit of fringe-level players. The picture, however, was not the same in every sub-sector, as some major projects provided huge demand for service providers, leading to better sales of services and equipment therein.

As an industry, we are serving almost one sixth of humanity, given that India's population is close to 1.3 billion. Trenchless

operations in India, therefore, are spread over several sectors and over the entire subcontinent. It would be very difficult to list all the main projects.

Some of the market movers in 2013 were interceptor sewers in Delhi; sewer rehab and microtunnelling for Kolkata; microtunnelling and sewer rehab projects in Mumbai; the marine outflow project at Pipavav, Mahanadi and Narmada; and Brahmaputra river crossings for petrochemical pipelines; as well as gas projects in several cities and 4G national telecom grid projects.

Prominent project owners ordering trenchless projects included the Delhi Jal Board (water utility), Kolkata Environmental Improvement Project, Municipal Corporation of Greater Mumbai, Indian Oil, GAIL India (gas utility), Reliance Jio (tele-

coms), and city gas companies. In addition to physical execution, subsurface investigations and pipeline condition assessments for several cities were conducted last year.

The Indian Society for Trenchless Technology (IndSTT) has conducted a survey of subsurface projects executed in India and the report is hosted on its website at www.indstt.com.

GETTING OFF THE GROUND

The nation is undergoing general elections to elect the government for the coming five years. There are two major contenders for this assignment, and each of them, in its election manifesto, has proposed to develop 100 new cities or urban clusters.

The budget for infrastructure upgrades is US\$1 trillion, including the National Road Transport



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Action points

IndSTT released a roadmap of objectives during No Dig India 2013. These include:

- Developing frameworks for disaster risk reduction (DRR) activities in hills, urban areas, river beds and other vulnerable regions through trenchless techniques;
- Establishment of trenchless-technology training centres in the hilly areas in association with the local institutions;
- Training the operating engineers and executives responsible for management of utilities in vulnerable areas;
- Developing a skilled workforce for the trenchless management and installation of subsurface networks;
- Conducting R&D on developing smaller machines that could be operated in the narrow lanes of urban villages;
- Creating the web-based Rate Analysis System to assist estimating engineers and give them inputs for conducting rate valuation on a real-time basis.

This roadmap has grown to address the subsurface construction needs in India's hilly regions, as the challenges there are different but the demand is exploding.

Based on these action points, IndSTT is now advising the client in preparing the detailed project report for a US\$50 million water-supply project for Kohima city, where current availability is one tenth of demand and undulating ground poses challenges in laying the new mains.



Safety Programme and city connectivity proposals. All such programmes are bound to give a huge stimulus to the trenchless industry.

The last government urban development programme was JnNURM, which was created for 78 cities and entailed substantial subsurface construction works.

Multilaterally funded government projects, approved in previous years, will be the movers and shakers this year. The general elections will be over by the middle of the year and whoever forms the government will have to prepare and pass the executive orders; only then can the anticipated projects materialise.

My personal opinion is that it would be about another three months by the time we start seeing the papers on the ground.

In the private sector, the situation is going to be similar, but with a shorter gestation period, as the project owners will wait for the final policies of the incoming government before investing. The situation, either way, is going to get better as people expect a decisive government at the helm of affairs.

As indicated earlier, the economic slowdown has made the situation difficult for smaller players. This has led to small operators being marginalised or taken over by bigger players. One difficulty expected is the limited number of companies available for the second line of defence, leading to overloading of larger players and stalling of bids/projects due to reduction in bidding capacities because of such overloading.

A year of reduced projects has

also resulted in a further deteriorated subsurface infrastructure compared with last year. Demand, on the other hand, has become further aggravated. This leads to more complex trenchless requirements that the Indian stakeholders would not be able to meet. We would require cross-border migration of trenchless professionals.

NEW GUIDELINES

IndSTT has issued third-party inspection guidelines, established to provide input for the trenchless operating procedures founded by the Public Works Department. In addition, IndSTT has proposed alternative dispute-resolution guidelines for trenchless works.

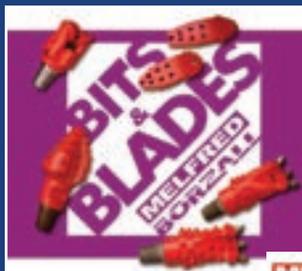
The Indian trenchless market is now showing signs of growth after a subdued year and a half. IndSTT expects a major turnaround by the fourth quarter of this year – by then the new government will be in the saddle and starting to initiate projects.▼

Left: new guidelines were launched at No Dig India 2013. Pictured: Ashok Gadia, RS Tyagi, PP Shrivastava, Chander Verma, PR Swarup



A trenchless project under Mumbai

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