1 Annexures

1.1 Questionnaires for LEADS 2024

1.1.1Perception-based questionnaire for LEADS 2024

About LEADS

Department for Promotion of Industry and Internal Trade, Ministry of Commerce & Industry, Government of India has commissioned Deloitte for the sixth edition of LEADS (Logistics Ease across Different States) Survey to assess the logistics efficiency across different States/Union Territories. This survey assesses how stakeholders across the logistics value chain experience the performance of associated functions across various States/UTs. The Department intends to bring focus to opportunities for improving logistics performance for trade across States/UTs.

We invite you to participate in this survey as you are an important stakeholder in the logistics sector and your inputs are critical for the policy makers. We will collate all response, analyze and present the overall findings to policy makers in the Ministry at an aggregate level. Your individual response while be kept confidential.

Survey Guidance/Instructions

General

- In this survey, 'performance of the State/UT' refers to performance of the logistics community operating across the State/UT comprising both government and private sector participants. It is not a reflection of the performance of the state government/UT administration alone but of the overall logistics ecosystem in the state/UT.
- Please select answers/options that best represent your experience of the logistics performance across your chosen State(s)/UT(s) against generally accepted industry standards or practices.
- Unless specifically requested otherwise, please respond to this survey with respect to your recent (last 1 year) experience with logistics performance across State(s)/UT(s)
- Please note that all responses will be kept confidential and will only be used for the purpose of this study.

Responding to questions

- This survey comprises two parts and will take approximately 20-30 minutes.
- Please take the survey in one sitting.

THANK YOU VERY MUCH FOR YOUR TIME AND PARTICIPATION IN THIS SURVEY!

Questionnaire for Logistics Ease Across Different States

For each question, please select the option that best describes your current work. All the questions are mandatory for beginning the survey.

(Disclaimer - Identity of all respondents will not be published anywhere, and all responses will be kept anonymous)

1 Name of Respondent:

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2 Name of the Company:

.....

.....

3 Phone Number: .....

4 Email ID: .....

5 Location:

City: .....

State: .....

Pin code: .....

6 Nature of market you primarily deal with:

EXIM .....

Domestic .....

Both .....

7 Your position in your company / firm *(select one)*:

- ◯ Senior Management
- ◯ Middle Management (Manager and above)
- ◯ Supervisor
- ◯ Operations Executive
- ◯ Other

8 Transport mode you typically deal with:

- ☐ Road
- ☐ Rail
- ☐ Airways
- ☐ Waterway (Sea, Inland)

9 Cargo type you primarily deal with:

- ☐ Bulk/Break Bulk
- ☐ Containerized Cargo (Reefer Cargo, Dry Cargo, Special Cargo)
- ☐ Non-Containerized (Perishable/ Non-perishable Cargo)
- ☐ Parcel (Express/Non-Express) Cargo
- ☐ Liquid cargo
- ☐ Others: Please specify

....

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10 Please indicate the predominant nature of your involvement in the logistics chain *(select one)*:

- ◯ Trader/Manufacturer
- ◯ Freight Forwarder (including freight agents)
- ◯ Transport Service Provider (including Road Hauler, Rail Operator, Shipping Line, Airline, Inland Waterways)
- ◯ Terminal Infrastructure Service Provider (including ICD, CFS, PFT, AFS, Air Cargo Terminal, Port Terminal, Warehouse, Cold Store, etc.)
- ◯ Logistics Service Provider (Customs broker, Air Cargo Agents, 3rd Party Logistics Service Provider (3PL), 4PL, NVOCC, Aggregators / Consolidators, Digital Service Providers

11 Please select top three (3) States/UTs where you perform logistics operations and/or are familiar with ground realities of logistics

State/UT 1 ☐

☐

State/UT 2 ☐

Section 1: Logistics Infrastructure

1) Rate the adequacy and quality of road infrastructure available in your chosen States/UTs *(Road Infrastructure here refers to the road network and associated quality such as road condition, easy vehicle movement, average speed, adequate road width (wide/narrow roads), availability of bypasses, traffic congestion etc.)*

	Very Poor	Poor	Average	Good	Very Good
State/ UT 1					
State/ UT 2					
State/ UT 3					

2) Rate the adequacy and quality of rail infrastructure available in your chosen States/UTs *(Rail Infrastructure here refers to the sufficiency of rail tracks, congestion of railway lines, etc.)*

	Very Poor	Poor	Average	Good	Very Good
State/ UT 1					
State/ UT 2					
State/ UT 3					

3) Rate the adequacy and quality of terminal infrastructure in your chosen logistics assets in the chosen States/UTs
(Terminal Infrastructure refers to ICDs, CFSs, Dry Ports, Land Customs Stations, AFSs, PFTs, MMLPs, Port terminals, Airport terminals, Inland Waterway Terminals, Good Sheds and Truck Terminals.)

	Very Poor	Poor	Average	Good	Very Good
State/ UT 1					
State/ UT 2					
State/ UT 3					

For the chosen states/UTs, please identify a minimum of 1 and maximum of 3 logistics assets that you are aware about:

- ☐ Ports
- ☐ Air freight Terminal
- ☐ Inland Waterway & Coastal Shipping Terminals
- ☐ Railway Good Sheds
- ☐ ICD, CFS, Private Freight Terminal
- ☐ Truck Terminals
- ☐ MMLPs
- ☐ Land Custom Stations

Rate the adequacy and quality of the chosen terminal infrastructure in the chosen States/UTs

Logistics Asset	State / UT - 1					State / UT - 2					State / UT - 3				
	Very Poor	Poor	Average	Good	Very Good	Very Poor	Poor	Average	Good	Very Good	Very Poor	Poor	Average	Good	Very Good
Ports															
Inland Waterway & Coastal Shipping Terminals															
ICD, CFS, Private Freight Terminal															
MMLPs															
Air freight Terminal															
Railway Good Sheds															
Truck Terminals															

4) Rate the adequacy and quality of first / last mile connectivity (via rail and/or road) to Industrial Infrastructure / Economic Zones / Terminal Infrastructure in your chosen States/UTs *(Industrial Infrastructure refers to Industrial Parks, Special Economic Zones, Special Investment Regions, Industrial Zone, etc.) (Terminal Infrastructure refers to ICDs, CFSs, Dry Ports, Land Customs Stations, AFSs, PFTs, MMLPs, Port terminals, Airport terminals, Inland Waterway Terminals, Good Sheds, Truck Terminals)*

	Very Poor	Poor	Average	Good	Very Good
State/ UT 1					
State/ UT 2					
State/ UT 3					

For the chosen states/UTs, please identify a minimum of 1 and maximum of 3 logistics assets that you are aware about:

- ☐ Ports
- ☐ Air freight Terminal
- ☐ Inland Waterway & Coastal Shipping Terminals
- ☐ Railway Good Sheds
- ☐ ICD, CFS, Private Freight Terminal
- ☐ Truck Terminals
- ☐ MMLPs
- ☐ Industrial Parks

☐ Land Custom Stations ☐ Special Economic Zones

☐ Industrial Zones

Rate the adequacy and quality of first / last mile connectivity (via rail and/or road) to the above chosen logistics assets in your chosen States/UTs

Logistics Asset	State / UT - 1					State / UT - 2					State / UT - 3				
	Very Poor	Poor	Average	Good	Very Good	Very Poor	Poor	Average	Good	Very Good	Very Poor	Poor	Average	Good	Very Good
Ports															
Inland Waterway & Coastal Shipping Terminals															
ICD, CFS, Private Freight Terminal															
MMLPs															
Land Custom Stations															
Air Freight Terminal															
Railway Good Sheds															
Truck Terminals															
Industrial Parks															
Special Economic Zones															
Industrial Zones															

5) Rate the adequacy and quality of warehousing, cold storages, pack-houses, etc. in your chosen States/UTs

(Adequacy of warehousing infrastructure refers to available capacity of warehouses including silos/bulk storage, consolidation centers, cold storages, etc. Quality of warehousing infrastructure refers to quality of warehouse structures including factors such as location, layout, among others.)

	Very Poor	Poor	Average	Good	Very Good
State/ UT 1					
State/ UT 2					
State/ UT 3					

Section 2: Logistics Services

6) Rate the adequacy and quality of terminal and warehousing services, specifically for storage and value-added functions, in your chosen States/UTs
(Terminal and Warehousing Services refers to handling and storage of cargo & containers and value-added services such as consolidation, repackaging, labelling, etc. at terminals. This does not include customs examination.)

	Very Poor	Poor	Average	Good	Very Good
State/ UT 1					
State/ UT 2					
State/ UT 3					

7) Rate the adequacy and quality of the transport services, specifically for transportation functions *(Transport services here refers to-haulage/transportation by different modes of transportation i.e., road, rail, air, and waterways.)*

	Very Poor	Poor	Average	Good	Very Good
State/ UT 1					
State/ UT 2					
State/ UT 3					

For the chosen states/UTs, please identify a minimum of 1 and maximum of 4 modes of transportation that you are aware about:

☐ Railways ☐ Waterways

☐ Roadways ☐ Airways

Rate the adequacy and quality of the transport services to the above modes of transportation in your chosen States/UTs

Mode of Transportation	State / UT - 1					State / UT - 2					State / UT - 3				
	Very Poor	Poor	Average	Good	Very Good	Very Poor	Poor	Average	Good	Very Good	Very Poor	Poor	Average	Good	Very Good
Railways															
Roadways															
Waterways															
Airways															

8) Rate the reasonableness of shipment prices incurred by you in your chosen States/UTs
(Shipment prices refer to the charges levied by logistics service providers for all services provided by them to the users.

Shipment prices include prices for transportation, handling, storage, value added services, as also for brokerage, commission etc.)

	Very Poor	Poor	Average	Good	Very Good
State/ UT 1					
State/ UT 2					
State/ UT 3					

For the chosen states/UTs, please identify a minimum of 1 and maximum of 3 logistics services that you are aware about:

☐ Ports
☐ Airports
☐ Rail Transport
☐ Road Transport
☐ Terminal & Warehousing Infrastructure
☐ Freight Forwarders & Agents

Based on your experience, please rate the quality of services with respect to the price paid for the chosen services in your chosen States and UTs

Logistics Asset	State / UT - 1					State / UT - 2					State / UT - 3				
	Very Poor	Poor	Average	Good	Very Good	Very Poor	Poor	Average	Good	Very Good	Very Poor	Poor	Average	Good	Very Good
Ports															
Airports															
Rail Transport															
Terminal & Warehousing Infrastructure															
Freight Forwarders & Agents															

9) Rate the timeliness of cargo delivery, in terms of how often does it reach the consignee within scheduled or expected delivery time
(Timeliness here refers to delivery within expected time within a State/ UT)

	Very Poor	Poor	Average	Good	Very Good
State/ UT 1					
State/ UT 2					
State/ UT 3					

10) Rate the availability of track and trace services for cargo movement in your chosen States/UTs
(This refers to the availability and usage of digital platforms for logistics management, such as e-

logistics platforms, and real-time tracking systems via mobile/internet connectivity for track and trace functions, and also monitoring the condition of cargo and/or container)

	Very Poor	Poor	Average	Good	Very Good
State/ UT 1					
State/ UT 2					
State/ UT 3					

11) Rate the availability of skilled manpower involved in delivery of logistics services in your chosen States/UTs

(Manpower here refers to drivers, equipment operators, Terminal Labour. Skilled manpower refers to personnel's knowledge/skills (suitability for the job), etc.)

	Very Poor	Poor	Average	Good	Very Good
State/ UT 1					
State/ UT 2					
State/ UT 3					

12) Rate the safety and security of cargo within your chosen States/UTs *(Safety/ Security refers to consistency in delivery without damage/ deterioration/ pilferage/ loss of cargo due to logistics inefficiencies or accidents or thefts during transportation of goods)*

	Very Poor	Poor	Average	Good	Very Good
State/ UT 1					
State/ UT 2					
State/ UT 3					

Section 3: Operating and Regulatory Environment impacting logistics infrastructure and service provision

13) Rate the State Government/UT administration's role in promoting/incentivizing/facilitating development and operations of logistics infrastructure

(State Government/UT's role here refers to ease of obtaining regulatory approvals and efficiency/ effectiveness of policies related to single window clearances, labor laws, ease of land use and related ancillary facilities, maintenance of law and order, and provision of tax breaks/subsidies/access to credit, grievance redressal and dispute resolution, etc.)

	Very Poor	Poor	Average	Good	Very Good
State/ UT 1					
State/ UT 2					
State/ UT 3					

14) Rate the State/UT based on the facilities provided at the border crossing points with other states/UTs and the ease of movement across from neighboring States/UTs

(This includes availability of facilities at cross-border points between states. Further, ease of entry refers to unwarranted checks, requirement for payment of bribes and stoppages across transport network at administrative borders.)

	Very Poor	Poor	Average	Good	Very Good
State/ UT 1					
State/ UT 2					
State/ UT 3					

15) Rate the State/UT based on your satisfaction with the logistics issues related grievance redressal mechanism of the selected State/UT?

	Highly Dissatisfied	Dissatisfied	Neutral	Satisfied	Highly Satisfied
State/ UT 1					
State/ UT 2					
State/ UT 3					

Section 4: Review of Sustainable Logistics

16) Rate your perception of the state's commitment to catalyzing sustainable logistics your chosen States/UTs

(Perception of the state's commitment to sustainable logistics practices including the adoption of green logistics and reduction of carbon footprints, among other initiatives.)

	Very Poor	Poor	Average	Good	Very Good
State/ UT 1					
State/ UT 2					
State/ UT 3					

17) Rate your perception of participation of women in the logistics workforce in your chosen States/UTs

(Perception on state's initiatives for supporting women participation and inclusivity in the logistics sector.)

	Very Poor	Poor	Average	Good	Very Good
State/ UT 1					
State/ UT 2					
State/ UT 3					

Section 5: Overall Feedback

A. Thinking about all aspects discussed so far, how would you rate your overall experience with logistics in your chosen States/UTs?

	Completely Dissatisfied	Somewhat Dissatisfied	Neutral	Somewhat Satisfied	Completely Satisfied
State/ UT 1					
State/ UT 2					
State/ UT 3					

B. Select the top five (5) issues/challenges being faced in the logistics sector in each chosen States/UT's separately.

Sn.	Key Issues	State/UT-1	State/UT-2	State/UT-3	Feedback
1.	Lack of first/last mile connectivity to economic zones/Industrial areas/Terminals				
2.	Congestion at terminals (Terminals include Ports/ CFS/ ICD/ AFS/ Intermodal stations/Good sheds/Warehouses etc.)				
3.	Shortage of warehouses and packhouses				
4.	Shortage of cold storages				
5.	Non-Availability of suitable Parking spaces/Public utilities along key freight routes (Public utilities include driver restrooms, medical facilities, truck repair facilities, 24X7 emergency helpline)				
6.	Lack of transparency and outdated laws leading to multiple enforcement checks and discretionary challans/fines, stoppages by Regional Transport Officer (RTO), Goods and Service Tax (GST) officers, among others leading to long haulage choke points				
7.	Lack of Single Window Mechanism for development and operations of logistics facilities (including regulatory approvals, unified grievance redressal, notified landbanks, among others) for logistics at State/UT level				
8.	Transport and labor unions monopolizing transportation ecosystems or levying illegal charges				
9.	Shortage of trained professionals and operators such as truck drivers and cargo handlers				

1.1.2Objective-based questionnaire for LEADS 2024

Please provide the details of the respondent:

Name of State:	
Name of Nodal Office/ Designated State Representative:	
Designation of Nodal Office/ Designated State Representative:	
Mobile Number:	
Email Address:	

This survey comprises 2 sections related to the logistics sector in States/UTs. All the questions are mandatory.

Section 1: Regulatory & Institutional Support for Enabling Logistics

#	Theme	Questions	Response
1.	Logistics Policy	Whether or not the State/UT has formulated a logistics policy? (Please share a copy of logistics policy)	(Yes/No)
		If yes, whether or not the State/UT has developed an action/implementation plan? Please share a copy of Action/Implementation Plan. If yes, which of the following aspects does the action plan include?	(Yes/No)
		a) Facilitation/ enabling mechanism for development of logistics park and warehousing sector	
		b) Human Resource Development Initiatives including skill development and education in the logistics sector	
		c) Initiatives / incentives towards technology adoption in the sector	
		d) Coverage of sector specific plan (including domestic and EXIM trade)	
		e) Initiatives / incentives towards promoting green logistics	
		f) Enhancing ease of doing business by improving regulatory interface – Whether the approval processes	

#	Theme	Questions	Response
		have been rationalized for single window clearance for all kind of approvals related to setting up of warehouses (Digital/Manual)	
		g) Initiatives towards gender parity in logistics workforce	
2	Regional Master Plan / City Logistics Plan	**Has the State/UT taken initiatives to assess infrastructure gaps, capacity deficits, or developed future plans to address logistics inefficiencies?**	(Yes/No)
		Whether or not State/UT has initiated preparation of Regional Master Plan / City Logistics Plan for top 2 cities within the state (If yes, please share a copy of City Logistics Plans (if developed) and the details of the organization assigned to undertake the assessment (if underway))?	(Yes/No)
		Whether or not the state/UT has developed an action/implementation plan and set up an institutional framework to undertake actions under Regional Master Plan/ City Logistics Plan (If yes, please share a copy of Action/Implementation Plan and Institutional Framework and the details of the organization assigned to undertake the assessment)?	(Yes/No)
3	PM GatiShakti Master Plan	**Whether or not the State/UT has completed the mapping of mandatory layers under GatiShakti as per the defined Standard Operating Procedures?** (Proof: Snapshot of SMP portal)	(Yes/No)
		How many additional layers, beyond the mandatory ones, have been mapped by the State/UT on the GatiShakti portal? (Kindly provide a list of the layers along with a snapshot)	
		Number of projects discussed in NPG meetings for PM GatiShakti: a) 1 - 5 Projects b) 6 - 10 Projects c) 11 - 15 Projects d) 16 - 20 Projects e) 20 & above Projects (Proof: Minutes of NPG meetings)	
		Whether or not the State/UT has completed the geo-referencing of land records on the PM GatiShakti portal? (If yes, kindly provide a snapshot of the same)	(Yes/No)

#	Theme	Questions	Response
		Whether or not the State/UT is mapping all projects to be funded under the 'Scheme for Special Assistance to States for Capital Expenditure' on the State Master Portal of GatiShakti? (If yes, please share a relevant documentary evidence)	(Yes/No)
		Whether or not the State/UT is mapping all projects other than the ones covered under the 'Scheme for Special Assistance to States for Capital Expenditure'? (If yes, please share a relevant documentary evidence)	(Yes/No)
		Whether or not the State/UT adopting PM GatiShakti for infrastructure planning? (If yes, State/UT to share the use cases where PMGS was used for project planning)	(Yes/No)
		Whether or not the State/UT is coordinating with other state departments and central ministries for integrated planning under GatiShakti? (If yes, please share the list of such projects and coordination mechanism followed for their successful implementation)	(Yes/No)
4	Human Resource Development	Whether or not the State/UT has taken initiative to promote skill development in logistics sector across the State/UT? (If yes, please share the details of such initiatives)	(Yes/No)
		Whether or not the State/UT has entered into partnerships with educational institutions and industry bodies? (If yes, please share the list of such partnerships)	(Yes/No)
5	Green Logistics	Does the State/UT have a policy or initiatives in place for promoting Green Logistics? (If yes, please share the copy of policy / list of project initiatives being undertaken by state/UT for promoting Green Logistics)	(Yes/No)
		Has the State/UT developed an action plan for implementing policy or to undertake initiatives related to Green Logistics? (If yes, please share a copy of Action/Implementation Plan and the details of the organization assigned to undertake the assessment)?	(Yes/No)
6	Facilitation by State/UT for central	Is the State/UT facilitating logistics sector projects undertaken by central government? (If, yes please provide list of such projects and role played	(Yes/No)

#	Theme	Questions	Response
	Govt projects	by state/UT)	
		Has the State/UT signed any Memorandums of Understanding (MOUs) or partnership agreements with central government agencies or ministries to develop logistics infrastructure? (If yes, please provide details of such projects)	(Yes/No)
7	Public-Private Partnerships (PPP)	**Is the State/UT leveraging Public-Private Partnerships (PPP) to develop logistics infrastructure and services?** (If yes, please provide list of logistics-related PPP projects that have been initiated or completed in the last three years?)	(Yes/No)
		Are States/UTs participating in Public-Private Partnerships (PPP) projects undertaken by central government? (If yes, please share the list of such PPP projects with the specific role of state/UT)	(Yes/No)
8	Industry Status to Logistics and Warehousing Sector	**Has the State/UT granted the Industry Status to Logistics Sector?** (If yes, please provide documentary proof along with specific case examples/use cases of companies/businesses that have benefited from the granting of this status.)	(Yes/No)
9	Streamlining of Regulatory Processes	**Has the State/UT streamlined regulatory processes to enhance the efficiency of logistics operations?** (If yes, please provide details of such initiatives including online platforms for logistics compliance, such as e-permits, digital documentation, single window platform, and automated approvals?)	(Yes/No)
		Has the State/UT streamlined regulatory processes for development of logistics infrastructure? (If yes, please provide the details of adopted measures such as dedicated frameworks for land allocation, zoning regulations, and fast-tracking construction permits specifically for logistics projects)	(Yes/No)
10	ULIP Adoption for State-Level Planning for Logistics	**Has the State/UT has signed any Memorandum of Understanding (MOU) or initiated any specific actions regarding the Unified Logistics Interface Platform (ULIP) to enhance logistics planning and operations?** (If yes, kindly provide a list of the data layers integrated with ULIP)	(Yes/No)
11.	**Please describe any other planned, upcoming, or future initiatives being undertaken by the State Government / UT administrations (100-250 words).**		

#	Theme	Questions	Response

Section 2: Enablers of Logistics

Data from State Authorities

Please provide the data on the following parameters, as of 31st March for each of the given financial years.

#	Dataset	Type	2023-24	2022-23	2021-22
1	Total length of State Highways	Surfaced (Km)			
		Unsurfaced (Km)			
2	Total length of District Roads	Surfaced (Km)			
		Unsurfaced (Km)			
3	Total length of Urban Roads	Surfaced (Km)			
		Unsurfaced (Km)			
4	Total length of Rural Roads	Surfaced (Km)			
		Unsurfaced (Km)			
5	Total length of Roads under Pradhan Mantri Gram Sadak Yojana	Surfaced (Km)			
		Unsurfaced (Km)			
6	Total number of registered Goods Commercial Vehicles (GCVs)	In Number			
7	Number of road accidents during the year of Goods Commercial Vehicles	In Number			
8	Total number of registered drivers for Goods Commercial Vehicles (GCVs)	In Number			
9	Capacity of Warehouse including: (a) State owned warehouses	In Million tonnes			

#	Dataset	Type	2023-24	2022-23	2021-22
	(b) Centrally owned warehouses (c) Private owned warehouses				
10	**State-wise Capacity (in Mill. Tones) of non-major ports**				
11	**Capacity of Cold Storages including:** (a) State owned cold storages (b) Centrally owned cold storages (c) Private owned cold storages	In Million tonnes			
12	**Number of training centers for logistics**	In Number			
13	**Number of professionals trained in the training centers**	In Number			
14	**Number of education institutions providing degree/ diploma courses in logistics**	In Number			
15	**Number of professionals trained in above institutes**	In Number			
16	**Total budgetary allocation made by the State/UT (Public + Private investment) in:** ***(a)*** *Road connectivity* ***(b)*** *Rail connectivity,* ***(b)*** *Logistics infrastructure* ***(c)*** *Logistics sector skilling*	In INR			
17	**Total investment made by the State/UT (Public + Private investment) in:**	In INR			

#	Dataset	Type	2023-24	2022-23	2021-22
	(a) Road connectivity *(b) Rail connectivity,* *(b) Logistics infrastructure* *(c) Logistics sector skilling*				
18	**Gross Value Added (Transport and Logistics) for the state**	In INR			
19	**Population of the state**	In Number			
20	**Area of the state**	In Sq kms			

Data from Central authorities

Please provide the data on the following parameters for the given financial years.

#	Dataset	Source	2022-23	2023-24
1	State wise length of National Highways (in Kms)	National Highway Authority of India		
2	State-wise number of Inland Container Depots (ICDs) and Container Freight Stations (CFSs)	Central Board of Excise and Customs		
3	State-wise capacity (in Mill. tonnes) of Inland Container Depots (ICDs) and Container Freight Stations (CFSs)	Central Board of Excise and Customs		
4	State-wise number of Air cargo terminals	Ministry of Civil Aviation//AAI Class		
5	State-wise Capacity (in Mill. Tones) of Major ports	Ministry of Ports, Shipping and Waterways		
6	State-wise Utilization (in %) for Major ports	Ministry of Ports, Shipping and Waterways		
7	Business Reform Action Plan ratings	Ministry of Commerce and Industry		