Conference on

Future of Coal-based Generation

Changing Role, New Requirements, Fuel Supply and Demand Outlook

January 30-31, 2018, Shangri-La's The Eros, New Delhi

Organiser:

POWERLINE

Indian Infrastructure

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FUTURE OF COAL-BASED GENERATION

Mission

- India's reliance on coal as the dominant source of power generation continues, accounting for about 80 per cent share in total generation in 2016-17. However, the segment currently faces multiple challenges.
- Capacity additions have slowed down with the project pipeline drying up. From 20 GW plus additions in recent years, only about 10.6 GW of coal-based capacity was added in 2016-17, which was even lower than that of renewables (at 11.3 GW). Going forward, the Central Electricity Authority (CEA) has projected that no new coal-based plants would be needed before 2027.
- Lack of demand from discoms along with a spurt in renewable power generation has led to drastically reduced plant load factors (PLFs). In 2016-17, the national PLF stood at 59.6 per cent, a decrease of 2.44 per cent from the previous year. Even though the PLFs have improved marginally in the first six months of 2017-18, at 65.9 per cent, they still remain considerably low.
- Of late, fuel availability issues for power plants have resurfaced. A number of projects have reported low reserve coal stocks owing to a combination of factors, including a demand surge and rail transportation issues.
- Moreover, the magnitude of the stressed coal-based power capacity problem remains large, owing to a host of reasons including a dearth of fresh power purchase agreements (PPAs) and the non-availability of fuel supply agreements, besides the inability of promoters to infuse equity and service debt. The government is, however, planning to address these issues through a host of strategies including auctioning of stressed plants, encouraging their acquisition by public sector undertakings, as well as through the modification of PPA norms.
- Meanwhile, to comply with the emission norms, the focus of developers is on installing/upgrading air emission control systems, improving water and wastewater management, and deploying more effective fly and bottom-ash handling strategies. However, given that these entail significant capex, developers are awaiting more clarity on tariffs and cost recovery mechanisms to be duly compensated.
- Developers are also revisiting their O&M strategies in light of the energy efficiency targets for thermal power plants, coal washing requirements, safety improvements, etc. Modernisation of the ageing fleet through digitisation is also gaining traction to help improve generation and reliability, and keep them in business.
- Flexibilisation is becoming a focal point for plant operators due to the growing share of intermittent renewable power generation. It is being increasingly realised that with greater renewables in the grid, coal-based power plants would need to be flexibilised to run at partial loads.
- **The mission of this conference is to discuss the future of coal-based power generation in India in light of its changing role and new requirements. It will examine potential strategies and solutions that developers and plant operators need to consider to address the new challenges, whether they relate to market developments, financial stress, environmental concerns or fuel supply. The conference will feature the viewpoint of all stakeholders and also provide a platform to showcase the best practices and most promising technologies.**

Previous participants

*The participating organisations in our previous conferences on **"Coal-based Power Generation"** include **ABB, ABG Shipyard, ACB, ACC, Adani, Aditya Birla, Adhunik Power, Amtek Auto, APCPL-NTPC, APGENCO, Archean Group, Atlas Copco, Atlas Logistics, Auma, Avantha Power, Axis Bank, Banyan Tree Advisors, BALCO, Badrinarain Alloys & Steel, Bajaj Engineering, Bank of Baroda, Bharat Forge, Bhartiya Rail Bijlee, Bharat Oman Refinery, BHEL, BirlaTyres, Black & Veatch, BlueStar, Bygging India, C&S Electric, Canara Bank, Carborundum Universal, CERC, Cethar Vessels, CLP India, Clyde Pumps, CMPDI, Coal India, Coastal Energen, Coastal Gujarat, CRISIL, Dalmia Cement, Deloitte Touche Tohmatsu, Development Consultant, DVC, E&Y, Eagle Burgmann, EICS Group, EIL, Elecon, ELP, Emerson Network Power, Energy Infratech, Essar Projects, Essel Mining, Evonik, EPSA, Exxon Mobil, Ferro Tech, Fichtner Consulting, FLSmidth, Gandhinagar University, GE, Getzner, Glencore India, GMR, GRIDCO, GVK Power, GSECL, HCC, Heavy Water Plant, Hindalco Industries, Hindustan Zinc, Hilti, Honeywell Automation, HPERC, Haryana Power Generation Corporation, ICF International, ICICI, ICICI Bank, IDBI, IDFC, IIFCL, ILFS energy, IMFA, Indus Law, India Uniper Power Servies Isgec John Thompson, JBIC, Jindal India Thermal, Jindal Power, JK Cemet, JM Financial, J Power, JSPL,JSW Energy JSW Power Trading, Kenna metal, Kepco, KfW IPEX Bank, Korus Energy, L&T Finance, L&T Infra Finance, L&T Power, L&T-Sargent&Lundy, Lahmeyer, Lanco Infratech, Leighton Contractors, Link Legal India Law Services, Lodge Cottrell, M3Investments, Mascot Dynamics, Macawber Beekay, Mahavir Multitrade, Mahagenco, Mahagenco C.P.&CHO, Mahagenco ChandrapurTPS, Mahagenco KhaperkhedaTPS, Mahagenco Office of ED (O&M), Marsh India, MB Power, McNally Bharat, MEIL, Mitsubishi, Mitsui, Monnet Ispat, MoP, Moser Baer, NALCO, North Karnataka Power, NSPCL, NTPC, OERC, OPG Power, Oriental Rubber Industries, PE Consulting, PFC, Power Machines, Princeton University, Proteck Circuits, PTC India, PWC, RECPDCL, Reliance Infrastructure, Religare Capital Markets, Rolux Rockwool, Rosa Power Safire Capital, Saigal Sea Trade, SBI Capital, SCCL Mines, Schede Lagertechnik, SDG, Sew Infrastructure, Shree Renuka Energy, Siemens, Sindya Power Generating Company, SN Power, SRF, Statkraft Energi, Surya Roshni, Takraf, Tata Projects, Tata Power, Telangana Power Generation, Technofab Engineering, Tecpro Systems, THDC, Thermax, Thermax Babcock & Wilcox, Thriveni, Thermodyne Technology, ThermoFisher Scientific, ThyssenKrupp, Torishima Pumps, TRF, Trident Group, Vedanta, Voith Turbo,Volvo, Walchandnagar Industries, Wartsila, Welspun Energy, Wipro, WymanGordon, YES Bank, Zuari Cement,** etc.*

AGENDA/STRUCTURE

KEY TRENDS AND OUTLOOK
- What have been the key trends and developments in coal-based generation?
- What are the capacity addition projections for the segment? What is the outlook for the segment?
- What are the key issues and challenges?

GOVERNMENT PERSPECTIVE
- What is the government's perspective on the development of coal-based power?
- What are the key issues and challenges? How does the MoP propose to address them?
- What is the status of coal supply to power plants under various allocation mechanisms?
- What has been the response to the coal linkage auctions under SHAKTI?

COAL INDIA LIMITED's PERSPECTIVE
- What is CIL's perspective on coal supply to the power sector?
- What are some of the new initiatives undertaken by CIL to enhance coal supply?
- What are some of the key steps being taken to improve coal evacuation?
- What is the future for demand and production?

PRIVATE PERSPECTIVE
- What has been the performance of existing coal-based plants?
- What are the key issues and concerns?
- What is the readiness of developers to meet the new environmental norms?
- What is the future outlook?

NTPC PERSPECTIVE
- What is NTPC's perspective on the current state of the coal-based segment?
- What are the key issues being faced for coal-based projects?
- What are the strategies being adopted to address these challenges?
- What is the future outlook?

STATE GENCO PERSPECTIVE
- What has been the performance of existing coal-based power plants?
- What are the key issues and challenges?
- What are the capacity addition plans? What is the future outlook?

STRESSED ASSETS
- What is the current level of stressed assets in the coal-based power segment?
- What has been the experience under various restructuring schemes?
- What are the possible solutions for addressing them?

ROLE IN RENEWABLES INTEGRATION AND LOAD BALANCING
- What role can coal-based power plants play in supporting renewables integration and load balancing?
- What are the potential strategies with respect to the utilisation of coal-based power?
- What are the key issues and concerns?

EMISSION CONTROL
- What is the status of the implementation of the revised environmental norms?
- What are the proposed investments and costs envisaged in meeting the norms? What is the regulatory support available for power producers?
- What are the technologies and solutions available to meet the norms?

OPTIONS FOR POWER PLANTS WITHOUT PPAs
- What are the third-party power sale options for power plants?
- What are the power exchanges' selling options for power plants?
- What are the other sale options available?

DISCOMS' POWER PROCUREMENT OUTLOOK
- What has been the trend in power procurement by discoms with respect to prices and volumes?
- What has been the trend in power procurement by discoms with respect to the e-bidding and e-reverse auction mechanisms?
- What is the likely demand from power discoms?

COSTS AND TARIFFS
- What are the recent trends in generation and fuel costs for coal-based plants?
- What has been the trend in the issuance of fresh PPAs by discoms and the tariffs discovered?
- What is the outlook for costs and tariffs?

FOCUS ON O&M
- What are the new and emerging O&M requirements of coal-based plants? What are the best practices to enhance and maintain plant availability?
- What are the steps needed to improve safety in power plant operations?
- What are the promising technologies and solutions available?

FLEXIBILISATION STRATEGIES AND SOLUTIONS
- What are the different flexibilisation strategies and solutions available for coal-based power plants?
- What will be the impact of flexibilising coal-based power plants that are currently best suited for base loads?
- What are the costs and benefits associated with these solutions?
- What has been the experience so far in India and globally?

DIGITISATION OF POWER PLANTS
- What are the key plant areas that can be considered for digitisation?
- What are the potential benefits of digitisation?
- What role can data analytics play in the future of coal-based power plants?
- What are some of the emerging solutions for better asset management?

COAL QUALITY, PRICES AND OUTLOOK
- What are the key issues related to coal quality?
- What are the possible strategies to address them?
- What has been the trend with respect to coal prices?
- What is the outlook for supply?

COAL TRANSPORTATION
- What are some of the coal transportation-related challenges faced by coal-based power plants?
- What has been the trend in logistics costs associated with transporting coal to pithead and non-pithead power plants?
- What has been the impact on tariffs of coal-based power plants due to high rail freight charges?

Target Audience

- The conference is targeted at:

- Thermal power generators (central, private, state owned)
- Renewable energy developers
- Technology providers
- Power trading companies
- Financiers and investors
- BTG manufacturers
- Legal companies
- Regulatory agencies
- Government and planning agencies
- Environmental engineering consultants
- Coal producers and importers
- EPC contractors, etc.

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Two delegates	37,500	6,750	44,250	732
Three delegates	52,500	9,450	61,950	1,045
Four delegates	67,500	12,150	79,650	1,359

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