

# POWER DISTRIBUTION IN INDIA 2018

Market Analysis and Trends; Outlook and Projections

- ❖ Report (PDF)
- ❖ Data-set (Excel)

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## 1. Executive Summary

### SECTION I: MARKET SIZE, TRENDS AND DEVELOPMENTS

## 2. Size and Growth

- ❖ Growth in Distribution Line Length (by voltage)
- ❖ Growth in Distribution Transformer Capacity (by voltage)
- ❖ Trend in Substation Additions
- ❖ Trend in Energy Sales by Category
- ❖ Growth in Customer Base
- ❖ AT&C Loss Trends
- ❖ Metering Status
- ❖ Reliability Indices Performance
- ❖ Key Issues and Challenges
- ❖ Outlook

## 3. Policy and Regulatory Initiatives

- ❖ Consultation Paper on Open Access
- ❖ Saubhagya Promise
- ❖ Draft National Energy Policy
- ❖ Electricity Act (Amendment) Bill
- ❖ MERIT Portal
- ❖ Vidyut Pravah
- ❖ EV Charging Infrastructure-related Developments
- ❖ Others

## 4. Key Recent Developments

- ❖ Update on Government Programmes
- ❖ Smart Meter Tender Results
- ❖ Discom Rankings as per Annual Ratings
- ❖ Update on Distribution Franchises
- ❖ Compensatory Tariff Update
- ❖ Recent Tariff Hikes
- ❖ Recent Competitive Bids and PPA Cancellations
- ❖ Others - Proposed PPA amendments, DBT, Rationalisation of Tariff Categories, etc.

## 5. Inter Discom Comparison

- ❖ Number of Consumers
- ❖ Energy Sales
- ❖ Line Length
- ❖ Transformer Capacity
- ❖ Metering Status
- ❖ Billing and Collection Efficiency
- ❖ AT&C Losses
- ❖ ACS-ARR Gap
- ❖ Power Purchase Costs
- ❖ Profits/Losses
- ❖ Power Quality and Reliability

### SECTION II: OUTLOOK AND KEY PROJECTIONS

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- ❖ Projected Line Length Additions
- ❖ Projected Substation Additions
- ❖ Projected Distribution Transformer Capacity Additions
- ❖ Projected Metering Requirements
- ❖ Projected Investments in Distribution Network

## 7. Capital Expenditure

- ❖ Trends in Year-wise Capex
- ❖ Discom-wise Capex Trends
- ❖ Key Capex Components
- ❖ Targets/Planned Capex By Discoms (till 2022-23)
- ❖ Proposed Break-up of Planned Capex
- ❖ Funding Sources

## 8. Equipment Requirements (till 2022-23)

- ❖ Growth Drivers
- ❖ Projected Demand for Equipment
  - Cables
  - Conductors
  - Transformer
  - Switchgear
  - Energy Meters

### SECTION III: FOCUS AND IMPACT OF KEY GOVERNMENT PROGRAMMES

## 9. Ujwal Discom Assurance Yojana (UDAY)

- ❖ Key Features and Targets
- ❖ All-India Impact of UDAY
- ❖ State-wise Performance on Key Parameters
- ❖ Bond Issuance
- ❖ Tariff Revisions
- ❖ Smart Metering
- ❖ Recent Developments
- ❖ Issues and Concerns
- ❖ The Way Forward

## 10. Saubhagya (Including Deendayal Upadhyaya Gram Jyoti Yojana)

- ❖ Rural Electrification Progress till date
- ❖ Overview and Current Status of DDUGJY
- ❖ Rationale for Saubhagya
- ❖ Saubhagya Guidelines
- ❖ Expected Impact of Saubhagya
- ❖ Update on "24x7 Power For All"
- ❖ Key Issues and Concerns
- ❖ Outlook

## 11. Integrated Power Development Scheme (IPDS)

- ❖ Status of R-APDRP
- ❖ Progress under IPDS
- ❖ AT&C Loss Reduction Targets and Achievements
- ❖ Sanctions and Disbursements
- ❖ SCADA Progress
- ❖ Plans for IT Phase-II
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- ❖ Key Issues and Concerns
- ❖ Outlook

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- ❖ Current Status of Pilot Projects
- ❖ National Smart Grid Mission Update
- ❖ Smart Metering Related Updates
- ❖ Other Smart Grid Projects
- ❖ Issues and the Way Forward

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- ❖ Perform, Achieve and Trade (PAT) Scheme Targets for Discoms
- ❖ Progress under Other DSM initiatives
- ❖ Regulatory Scenario
- ❖ Issues and Challenges

**SECTION IV: COSTS, TARIFFS AND DISCOM FINANCES****14. Power Purchase Costs**

- ❖ Year-wise Trends in Power Purchase Costs (Aggregate and Per Unit)
- ❖ Trends in Utility-wise Power Purchase Costs (Aggregate and Per Unit)
- ❖ Source-wise Power Purchase Costs (by Utility)
- ❖ Long-term Procurement through Case 1
- ❖ Short-term Power Trading by Discoms
- ❖ E-bidding under DEEP

**15. O&M Costs**

- ❖ Year-wise Trends in O&M Costs
- ❖ Trends in Utility-wise O&M Costs
- ❖ O&M Costs Break-up

**16. Tariff Trends**

- ❖ State and Utility-wise Trends in Tariffs
- ❖ Tariff Revisions
- ❖ Category-wise Tariff Trends
  - Agricultural
  - HT Industrial
  - LT Industrial
  - Commercial
- ❖ Trends in Cross-subsidy Surcharges

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- ❖ Trends in Utility-wise Revenues
- ❖ Trends in Utility-wise Expenditures
- ❖ Trends in Utility-wise Gross Profits
- ❖ Trends in Utility-wise Net Profits
- ❖ ACS-ARR Gap Trends
- ❖ Outstanding Debt of Discoms
- ❖ Trends in Subsidies

**18. Key Ratio Analysis**

- ❖ Return on Equity
- ❖ Return on Net Worth
- ❖ Return on Capital Employed
- ❖ Debt-Equity Ratio

**19. Outlook**

- ❖ Factors Impacting Long-term Power Purchase Costs
- ❖ Projected Power Purchase Costs
- ❖ Outlook for Prices in the Short-term Market
- ❖ Tariff Outlook
- ❖ Outlook on Discom Finances

**SECTION V: DISTRIBUTION FRANCHISEES: EXPERIENCE AND OUTLOOK****20. Experience So Far**

- ❖ Operational/Awarded Franchises
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- ❖ Recently Awarded Franchises
- ❖ Issues and Challenges
- ❖ Success Factors
- ❖ Outlook

**21. Performance of Operational Franchises**

- ❖ Overview of Operations
- ❖ AT&C Losses Reduction Performance
- ❖ Performance on Other Parameters
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**SECTION VI: DISCOM PROFILES****22. Profiles of Discoms by State**

- ❖ Andhra Pradesh (APSPDCL, APEPDCL)
- ❖ Assam (APDCL)
- ❖ Bihar (NBPDC, SBPDCL)
- ❖ Chhattisgarh (CSPDCL)
- ❖ Delhi (BRPL, BYPL, TPDDL)
- ❖ Gujarat (PGVCL, UGVCL, MGVCL, DGVCL, Torrent Power)
- ❖ Goa (Goa PD)
- ❖ Haryana (UHBVN, DHBVN)
- ❖ Himachal Pradesh (HPSEB Limited)
- ❖ Jammu & Kashmir (JKPDD)
- ❖ Jharkhand (JBVNL)
- ❖ Karnataka (BESCOM, HESCOM, GESCOM, CESCO, MESCOM)
- ❖ Kerala (KSEB Limited)
- ❖ Madhya Pradesh (MP Paschim, MP Poorv, MP Madhya)
- ❖ Maharashtra (MSEDCL, Rlnfra, Tata Power, BEST)
- ❖ Manipur (MSPDCL)
- ❖ Meghalaya (MePDCL)
- ❖ Odisha (CESU, WESCO, NESCO, SESCO)
- ❖ Punjab (PSPCL)
- ❖ Rajasthan (JVNL, AVNL, JdVNL)
- ❖ Sikkim (Sikkim PD)
- ❖ Tamil Nadu (TANGEDCO)
- ❖ Telangana (TSNPDCL, TSSPDCL)
- ❖ Tripura (TSECL)
- ❖ Uttarakhand (UPCL)
- ❖ Uttar Pradesh (DVVNL, PVNVL, PuVNL, MVNL, KESCO, NPCL)
- ❖ West Bengal (WBSIEDCL, CESC, India Power)

**Each profile will cover the following:**

- Operational Area
- Line Length
- Transformer Capacity
- Customer Base
- Category-wise Energy Sales
- AT&C Losses
- Recent and Proposed Capex
- Metering Status
- Reliability Indices (SAIFI, SAIDI)
- Planned Network Additions
- Key Financials
- Tariffs
- Power Purchase Cost
- O&M Costs

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