The power distribution segment has seen some significant developments in the past few years with progressive policy-led changes. After almost three years of its launch in November 2015, while UDAY has brought about a difference in the state of the discoms, the two key performance parameters, AT&C losses, and the gap between the average cost of supply (ACS) and the average revenue realised (ARR), have recorded visible declines. Financial losses of discoms have also reduced considerably. Another milestone for the segment last year was the completion of village electrification. The Saubhagy scheme for household electrification is currently underway and progressing at a swift pace to ensure that the target is met by the end of this fiscal year. The other key distribution segment programmes - the IPDS and DDUGJY are also making significant headway with work now nearing the halfway mark. Distribution franchising is picking up pace with UDAY and more states are looking to opt for this route. The government also plans to install 30 million smart meters by 2019 to enable two-way communication between the utility and the consumer. Going forward, the segment is preparing itself for a transition with major policy reforms on the cards including the Electricity Act amendments and the Tariff Policy amendments. These reforms lay the groundwork for the separation of content and carriage, besides penalising faulty distributors and ensuring subsidy disbursements through direct benefit transfers, among other things which could be game changers for the sector in the years to come.

EXECUTIVE SUMMARY

SECTION A: SECTOR ANALYSIS AND OUTLOOK

1. Sector Size and Growth
   - Growth in Line Length (by voltage)
   - Growth in Transformer Capacity (by voltage)
   - Trends in Energy Sales and Consumer Base
   - Trends in AT&C Losses
   - Performance of Reliability Indices
   - Growth Drivers
   - Issues and Concerns

2. Recent Policy and Regulatory Moves
   - Draft Electricity (Amendment) Act, 2018
   - Draft Amendments to Tariff Policy, 2016
   - Proposed Uniform Tariff Framework
   - Aggregate Medium-term Pilot Scheme for Procurement
   - PRAAPTI web portal and application
   - CERC's consultation paper on tariff regulations for 2019-24
   - CERC's discussion paper on Redesigning Real Time Electricity Market
   - CERC's discussion paper on Redesigning the Ancillary Services Mechanism
   - Clarification on Charging Infrastructure for EVs
   - FAME-II Scheme for EVs and State EV Policies
   - Others (Proposal for National Discom, Tightening of Lending norms)

3. Key Recent Developments
   - Progress under Government Schemes
   - Updates under Smart Metering National Programme

4. Inter-Discusn Comparison
   - Consumer Base
   - Energy Sales
   - Line Length
   - Transformer Capacity
   - AT&C Losses
   - ACS-ARR Gap
   - Power Purchase Costs
   - Net Profits
   - Metering Coverage
   - Power Quality and Reliability

5. Impact Analysis of Emerging Trends
   - PPA-related developments
   - Tariff Hikes
   - Recent Developments impacting Discorn Tariffs
   - Digital Initiatives
   - Discorn Rankings
   - Updates related to Private Participation in Distribution

6. Analysis of Operational Performance
   - Billing Efficiency
   - Collection Efficiency
   - AT&C Losses
   - ACS-ARR Gap
   - Outages

   - Trends in Utility-wise Revenues
   - Trends in Utility-wise Gross Profits
   - Trends in Utility-wise Net Profits
   - Outstanding Debt of Discoms
   - Payable Days
   - Trends in Subsidies Booked and Received
   - Key Ratio Analysis

8. Expenditure Analysis
   - Cost Break-up of Utilities
   - Utility-wise Trends in Power Purchase Costs (aggregate and per unit)
   - Source-wise Power Purchase Costs (by Utility)
   - Long-term Procurement through Case 1
   - Utility-wise Trends in O&M Costs

9. O&M Costs
   - Year-wise Trends in O&M Costs
   - Trends in Utility-wise O&M Costs
   - O&M Costs break-up

    - Trends in Year-wise Capex
    - Discom-wise Capex Trends
    - Key Capex Components
    - Planned Capex and Proposed Break-up
    - Capex Break-up of Major Discoms

PPA-related developments
Tariff Hikes
Recent Developments impacting Discorn Tariffs
Digital Initiatives
Discorn Rankings
Updates related to Private Participation in Distribution

DT Failure Rates
SAIDI & SAIFI Indices
Challenges and the Way Forward
11. **Power Purchase Costs**
   - Aggregate Power Purchase Cost Trend
   - Per Unit Power Purchase Cost Trend
   - Impact of Recent Developments on Power Purchase Costs
   - Source-wise Power Purchase Costs (by Utility)
   - Long-term Procurement through Case 1 bidding
   - Short-term Power Trading by Discoms

12. **Tariff Trends**
   - State and Utility-wise Trends in Tariffs
   - Recent Developments Impacting Tariffs
   - Tariff Revisions
   - Category-wise Tariff Trends (Agricultural, Domestic, Industrial HT & LT, Commercial)
   - Global Comparison
   - Trends in Cross-subsidy Surcharges

13. **Ujwal Discom Assurance Yojana (UDAY)**
   - Overview
   - Baseline Scenario
   - Impact of UDAY on Financial Parameters
     - Debt Restructuring and Issuance of Bonds
     - AT&C Losses
     - ACS-ARR Gap
   - Trend in Tariff Revisions
   - Impact of UDAY on Operational Parameters
   - Smart Metering Progress
   - Issues and Concerns
   - Next Steps

14. **Saubhagya**
   - Overview
   - Saubhagya - Key features, implementation procedure, etc.
   - Baseline Scenario
   - DDUGJY Physical Progress
   - Progress in HH Electrification
   - Status of Grants and Budgetary Support
   - Major Challenges
   - Outlook

15. **Integrated Power Development Scheme (IPDS)**
   - Physical Targets and Achievements
   - Sanctions and Disbursements
   - Progress under R-APDRP & SCADA
   - Progress of IT enablement under Phase-II
   - Underground Cabling under IPDS
   - Smart Meter Installations
   - Key Issues and Concerns
   - Outlook

16. **Smart Grid Initiatives**
   - Status of Pilot Projects
   - NSGM Framework and Targets
   - Projects under National Smart Grid Mission
   - Other Smart Grid initiatives by Discoms
   - Key Learnings
   - Issues and Way Forward

17. **Impact of Alternative Power Procurement Options on Discoms**
   - Trends in OA Sales
   - RE-based Open Access Market
   - Exchange-based Power
   - Captive Consumption
   - Issues and Concerns
   - Future Outlook

18. **Future Outlook for Network Growth**
   - Projected Line Length Additions
   - Projected Substation Additions
   - Projected Distribution Transformer Capacity Additions
   - Projected Metering Requirements

19. **Future Outlook for Costs, Tariffs and Finances**
   - Outlook on Power Purchase Costs
   - Tariff Outlook
   - Outlook on Discom Finances
   - Outlook for UDAY

20. **Projected Equipment Requirements**
   - Planned Investments in Distribution Network
   - Growth Drivers
   - Projected Demand for Equipment
     - Cables
     - Conductors
     - Transformer
     - Switchgear

SECTION B: DISCOM PROFILES

Profiles of Discoms by State:
- Andhra Pradesh (APSPDCL, APEPDCL)
- Assam (APDCL)
- Bihar (NBPDCL, SBPDCL)
- Chhattisgarh (CSPDCL)
- Delhi (BRPL, BYPL, TPDDL)
- Gujarat (PGVCL, UGVCL, MGVCL, DGVCL, Torrent Power)
- Goa (Goa PD)
- Haryana (UHBVN, DHBWN)
- Himachal Pradesh (HPSEB Limited)
- Jammu & Kashmir (J&KPD)
- Jharkhand (JBVNL)
- Karnataka (BESCOM, HESCOM, GESCOM, CESCOM, MESCOM)
- Kerala (KSEB Limited)
- Madhya Pradesh (MP Paschim, MP Poorv, MP Madhya)
- Maharashtra (MSEDCL, Adani Electricity, Tata Power, BEST)
- Manipur (MSPDCL)
- Meghalaya (MePDCL)
- Odisha (CESU, WESCO, NESCO, SOUTHCO)
- Punjab (PSPCL)
- Rajasthan (J&VNL, AVNL, JdVNL)
- Sikkim (Sikkim PD)
- Tamil Nadu (TANGEDCO)
- Telangana (TSNPDCL, TSSPDCL)
- Tripura (TSECL)
- Uttarakhand (UPCL)
- Uttar Pradesh (DVVNL, PVVN, PuVVNL, MVVN, KESCO, NPCL)
- West Bengal (WBSEDCL, CESC, India Power)

Each profile covers information on traffic, capacity, existing infrastructure, ongoing and upcoming projects, and future expansion plans.
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