New Research Report

POWER DISTRIBUTION IN INDIA 2019

Segment Analysis and New Developments; Outlook and Projections

- Report (PDF)
- Data-set (Excel)

India Infrastructure Research

www.indiainfrastructure.com

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 Saubhagya 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 disbursals through direct benefit transfers, among other things which could be game changers for the sector in the years to come.

SECTION IV: OUTCOMES OF KEY GOVERNMENT PROGRAMMES

13. **Ujwal Discom Assurance Yojana (UDAY)**
    - ❖ Baseline Scenario
    - ❖ Impact of UDAY on Financial Parameters
    - ❖ Operational Performance Outcomes
    - ❖ Debt Restructuring
    - ❖ Trend in Tariff Revision
    - ❖ Smart Metering Progress
    - ❖ Performance under Other UDAY Parameters
    - ❖ Issues and Concerns
    - ❖ Next Steps

14. **Saubhagya**
    - ❖ Baseline Scenario
    - ❖ DDUGJY Physical Progress
    - ❖ Progress in HH Electrification
    - ❖ Focus on Major States
    - ❖ Status of Grants and Budgetary Support
    - ❖ Update on "24x7 Power For All"
    - ❖ Major Challenges
    - ❖ Outlook

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

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

17. **DSM and Energy Efficiency Programmes**
    - ❖ Perform, achieve and Trade (PAT) Scheme Targets for Discoms
    - ❖ Progress under Other DSM Initiatives
    - ❖ Regulatory Scenario
    - ❖ Issues and Challenges

SECTION V: KEY FOCUS AREAS

18. **Private Participation in Distribution**
    - ❖ DF Experience So Far
    - ❖ Operational/Awarded DFs
    - ❖ Terminated Franchises
    - ❖ Recently Awarded Franchises
    - ❖ Recent Bids
    - ❖ Profiles of Distribution Franchisees
    - ❖ Upcoming Opportunities
    - ❖ Future Outlook
    - ❖ Issues and Concerns

19. **Metering**
    - ❖ Current Metering Coverage
    - ❖ Discom-wise Comparison
    - ❖ Policy Directives
    - ❖ Smart Metering
    - ❖ Prepaid Metering
    - ❖ Net Metering
    - ❖ Future Metering Requirements

20. **Smart Grids**
    - ❖ Policy and Regulatory Framework
    - ❖ Key Technologies and Functionalities
    - ❖ AMI and AMR Uptake
    - ❖ Role in Smart Cities
    - ❖ Emerging Trends
    - ❖ Issues and Concerns
    - ❖ Future Outlook

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

SECTION VI: OUTLOOK AND PROJECTIONS

22. **Future Outlook for Network Growth (till 2023-24)**
    - ❖ Projected Line Length Additions
    - ❖ Projected Substation Additions
    - ❖ Projected Distribution Transformer Capacity Additions
    - ❖ Projected Metering Requirements

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

24. **Projected Equipment Requirements (till 2023-24)**
    - ❖ Projected Investments in Distribution Network
    - ❖ Growth Drivers
    - ❖ Projected Demand for Equipment
        - Cables
        - Conductors
        - Transformer
        - Switchgear
        - Energy Meters, etc.)

SECTION VII: DISCOM PROFILES

25. **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, DHBVN)
    - ❖ Himachal Pradesh (HPSEB Limited)
    - ❖ Jammu & Kashmir (JKPDD)
    - ❖ 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 (JVVNL, AVVNL, JdVVNL)
    - ❖ Sikkim (Sikkim PD)
    - ❖ Tamil Nadu (TANGEDCO)
    - ❖ Telangana (TSNPDCL, TSSPDCL)
    - ❖ Tripura (TSECL)
    - ❖ Uttarakhand (UPCL)
    - ❖ Uttar Pradesh (DVVNL, PVNNL, PuVVNL, MVVNL, KESCo, NPCL)
    - ❖ West Bengal (WBSEDCL, CESC, India Power)

Each profile would cover the following:

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

26. **Appendix**

I would like to purchase the **"Power Distribution in India 2019"** report:

Format (PDF)	By January 4, 2019	By January 25, 2019	After January 25, 2019
Site Licence (Single Location)	Rs 60,000	Rs 67,500	Rs 75,000
GST @ 18%	Rs 10,800	Rs 12,150	Rs 13,500
Total	☐ **Rs 70,800**	☐ **Rs 79,650**	☐ **Rs 88,500**
Enterprise Licence (Multiple Locations)	Rs 90,000	Rs 1,01,250	Rs 1,12,500
GST @ 18%	Rs 16,200	Rs 18,225	Rs 20,250
Total	☐ **Rs 1,06,200**	☐ **Rs 1,19,475**	☐ **Rs 1,32,750**

I am enclosing a cheque/demand draft for Rs ________________________, vide cheque/demand draft no. ______________________ drawn on

_______________________ dated ________________ in favour of **"India Infrastructure Publishing Pvt. Ltd."**

Signature

Name (BLOCK LETTERS) ______________________________

Designation ______________________________

Company ______________________________

Mailing Address ______________________________

____

Telephone ________________ Mobile ________________

Fax ______________________________

E-mail ______________________________

Wire transfer details:

Beneficiary	:	India Infrastructure Publishing Pvt. Ltd.
Bank Name	:	The Hongkong and Shanghai Banking Corporation Ltd
Bank Address	:	R-47, Greater Kailash–1, New Delhi - 110048
Account No.	:	094179587002
Swift Code	:	HSBCINBB
IFSC Code	:	HSBC0110006

Contact details:

Sumita Kanjilal
Information Products
India Infrastructure Publishing Pvt. Ltd.
B-17, Qutab Institutional Area, New Delhi 110016, India
Tel: +91-11-46560421, 41034600, 41034601 Fax: +91-11-26531196
Mobile: +91-9958299609
Email: sumita.kanjilal@indiainfrastructure.com