COMMERCIAL AND INDUSTRIAL SOLAR MARKET IN INDIA

Key Trends, Regulatory Landscape and Demand Projections for Open Access-based and Captive Projects

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Commercial and industrial (C&I) consumers in India currently pay substantially high grid tariffs to discoms. The situation is such that across the country, irrespective of geography, C&I grid tariffs remain substantially higher than the levelised cost of onsite rooftop solar and offsite open access solar ( captive or third-party). In order to reduce their operating expenses, a number of C&I consumers have, therefore, started procuring solar power either through third-party PPAs or by setting up solar captive capacities.  Already, the C&I segment has the largest market share in rooftop solar deployment today and is also becoming increasingly active in the captive and third-party solar PPA segments. The report will provide the size and growth trends of solar power capacity in the C&I space, key growth drivers, emerging business models and, the cost & tariff trends.

While the primary driver is the attractive solar economics for this segment, favourable state policies, including concessions or exemptions from open access charges and attractive models such as group captive models have also encouraged many C&I consumers to procure solar power. A key focus area of the report will be state-wise analysis of C&I uptake across 12 key states which not only have a very high solar power potential but also have been active in promoting solar power uptake through relevant policies and regulations.

Finally, the section on Key Projects and Market Players will highlight the solar projects already set up and planned by key commercial and industrial users, as well as detailed profiles of select developers focused on setting up solar plants for this segment in India.

SECTION I: MARKET OVERVIEW

1. Executive Summary

2. Size and Growth
   - Annual growth trend
   - Current market size (MW)
     - Open access/ Third-party solar
     - Captive solar
   - State-wise Installed C&I capacity in rooftop space
   - Key growth drivers
   - State-wise potential (MW)
   - Key risks and challenges

3. Key Trends and Demand Drivers
   - Drivers and roadblocks
     - State-wise open access charges
     - Solar policy targets in focus states
     - State-wise retail tariffs
     - Discom health across key states
     - State-wise APPC trends
     - RPO trajectory
   - Power demand outlook
   - State-wise solar open access score
   - State-wise captive solar power score

4. Cost Structures, Tariff Trends and Project Returns
   - Cost economics of open access-based projects
   - Cost economics of captive solar project
   - Annual HT industrial tariff trends
   - Annual commercial tariff trends
   - Solar tariff trends across states
   - Return analysis

5. Industry Structure and Business Models
   - Power sale options
   - Current business models
     - Capex
     - Opex
   - Emerging business models
     - Aggregator
     - Solar as a Service

   - Policy and regulatory outlook
   - Potential challenges

SECTION II: STATE FOCUS

7. State Profiles
   (This chapter will feature detailed information and analysis of the C&I solar segment in 12 states. These are Andhra Pradesh, Chhattisgarh, Haryana, Gujarat, Karnataka, Madhya Pradesh, Maharashtra, Rajasthan, Tamil Nadu, Telangana, Uttarakhland and Uttar Pradesh)
   - Key features of the state's power sector
     - Power capacity mix (% and MW)
     - Generation mix (% and MUs)
   - Capacity trends in solar C&I segment
     - Growth in captive solar capacity (% and MW)
     - Growth in C&I rooftop solar capacity (% and MW)
     - List of third-party solar open access projects
   - Tariff trends
     - Discom-wise HT industrial tariffs (2018-19)
     - Discom-wise commercial tariffs (2018-19)
     - Comparison with solar tariffs
   - Cost economics and ROI
     - Project capex and opex
     - Payback period
     - State-wise ROI - Grid-power vs. captive solar
   - Policy and regulatory scenario
     - Open access charges for solar projects
     - Group captive regulations for solar projects

8. Current Projects and Planned Solar Capacity in the C&I Segment
   - Projected size of the solar C&I segment (2019-20 to 2024-25)
   - Discom-wise commercial tariffs (2019-20 to 2024-25)

   SECTION III: KEY PROJECTS AND MARKET PLAYERS

9. Key Developer Profiles
   (This will have information including project size, location, developer, EPC provider, business model, project cost, etc.)
   - Amplus Solar
   - CleanMax Solar
   - Fourth Partner Energy
   - Gensol Engineering
   - Hero Future Energies
   - Rays Power
   - ReNew Power
   - Sterling & Wilson
   - etc.
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