

HYDRO POWER IN INDIA 2017

Trends, Developments and Future Outlook

- ❖ Report (PDF)
- ❖ Data-set (Excel)

Table of Contents

SECTION I: MARKET OVERVIEW AND OUTLOOK

1. **Executive Summary**
2. **Sector Size and Growth**
 - ❖ Hydro Power Potential
 - ❖ Growth in Installed Capacity
 - ❖ Trends in Thermal-hydro Mix
 - ❖ Trends in Hydro Capacity Additions vis-a-vis Other Sources
 - ❖ Sector and Utility-wise Additions
 - ❖ Pumped Storage Capacity Additions
 - ❖ Trends in Generation Performance
 - ❖ Issues and Challenges
3. **Key Recent Developments**
 - ❖ Recent Capacity Additions
 - ❖ Recent Generation Performance
 - ❖ Recent Policy Developments
 - ❖ Recent M&A Deals and Financings
 - ❖ Environmental and Forest Clearances
4. **New Hydro Power Policy**
 - ❖ Proposed Features
 - ❖ Expected Fiscal Benefits
 - ❖ Expected Impact on the Sector
 - ❖ Issues and Concerns
5. **Other Policy and Regulatory Developments**
 - ❖ Cross-border Electricity Trade Guidelines
 - ❖ National Tariff Policy 2016 Provisions for Hydro Projects
 - ❖ Government's Scheme for Basin-wise Review of Hydro Power Potential
 - ❖ Peaking and Load Balancing
6. **Costs and Tariffs**
 - ❖ Key Factors Impacting Costs
 - ❖ Project Cost Trends
 - ❖ Trends in Tariffs
 - ❖ Tariffs of Recently Commissioned Projects
 - ❖ Issues and Concerns
 - ❖ Outlook
7. **Financing**
 - ❖ Funding Options
 - ❖ Recent Financings
 - ❖ M&A Deals
 - ❖ Stressed Projects
 - ❖ Investment Requirements
 - ❖ Issues and Concerns

8. **Delayed and Stalled Projects**
 - ❖ Key Reasons for Project Delays
 - ❖ Analysis of Stalled Projects
 - ❖ Outlook for Stalled Projects
 - ❖ Impact on Capacity Addition
9. **Cross-border Initiatives**
 - ❖ Existing Power Ties with Nepal and Bhutan
 - ❖ New Guidelines on Cross-border Electricity Trade and Impact
 - ❖ Upcoming Projects in Bhutan
 - ❖ Upcoming Projects in Nepal
 - ❖ Existing and Proposed Transmission Interconnections
 - ❖ Issues and Challenges
10. **State Initiatives (Uttarakhand, Himachal Pradesh, Jammu & Kashmir, Sikkim, Arunachal Pradesh)**
 - ❖ Institutional Framework and Key Incentives
 - ❖ Potential vs Development
 - ❖ Upcoming Capacities
 - ❖ Issues and Concerns
11. **Future Outlook**
 - ❖ Projected Capacity Additions
 - ❖ Investment Requirements
 - ❖ Outlook on Costs and Tariffs
 - ❖ Impact of Renewables and Role in Balancing
 - ❖ Risks and Challenges
 - ❖ Market Opportunities (For EPC contractors, equipment providers, financiers)

SECTION II: PLANT PERFORMANCE ANALYSIS

12. **Analysis of Existing Capacity**
 - ❖ By Project Size
 - ❖ By Ownership
 - ❖ By Player
 - ❖ By Type of Project (Run-of-river, PSP)
 - ❖ By Age of Project
 - ❖ By State
 - ❖ By Equipment-make
13. **Generation Performance Analysis**
 - ❖ Historical Trends
 - ❖ Targets vs Achievements
 - ❖ Best Performing Plants
 - ❖ Inter-plant Comparison
 - ❖ Inter-state Comparison
 - ❖ Inter-developer Comparison
 - ❖ Plant Availability Factor Analysis
 - ❖ Trend in Outages

14. Renovation and Modernisation

- ❖ Age-profile of Existing Projects
- ❖ Completed R&M Projects in Twelfth Plan
- ❖ Projects Proposed for R&M
- ❖ R&M Contracts Awarded

SECTION III: UPCOMING PROJECT ANALYSIS

15. Pipeline of Upcoming Projects

- ❖ Projects Under Construction
- ❖ Projects Under Planning, Survey and Investigation
- ❖ Projects Allotted by States
- ❖ Stalled Projects

16. Analysis of Upcoming Capacity

- ❖ By Year of Commissioning
- ❖ By Ownership
- ❖ By Unit Size
- ❖ By Location
- ❖ By Equipment-make
- ❖ By Type (Dam-based/Run-of-river)
- ❖ By Status (awaiting clearances, land acquisition, etc.)

17. Analysis of Delayed Projects

- ❖ Delayed Project Capacity
- ❖ Average Time Overruns
- ❖ Average Cost Overruns
- ❖ Reasons for Delays
- ❖ Mitigation Strategies

18. Key Projects Under Execution (Lower Subansiri, Tehri PSS, Polavaram, Ratle, Parbati-II, Kameng, Tapovan Vishnugad, Teesta VI, etc.)

- ❖ Project Background
- ❖ Progress so Far
- ❖ Key Issues Impacting the Project
- ❖ Completion Schedule

19. Upcoming Project Profiles

- ❖ Capacity
- ❖ Location
- ❖ Unit Size
- ❖ Developer
- ❖ Expected Year of Commissioning
- ❖ Investments Proposed
- ❖ Key Contractors
- ❖ Construction Status

SECTION IV: DEVELOPER PROFILES

(Each profile will include information on existing projects, operational performance, future plans, status of upcoming projects and financial performance.)

20. Central Public Sector Units

- ❖ NHPC
- ❖ SJVN
- ❖ THDC India
- ❖ NTPC
- ❖ NHDC
- ❖ NEEPCO
- ❖ BBMB
- ❖ DVC

21. State-owned Gencos

- ❖ Karnataka Power Corporation Limited
- ❖ Maharashtra State Power Generation Company Limited
- ❖ Tamil Nadu Generation and Distribution Corporation
- ❖ Orissa Hydro Power Corporation Limited
- ❖ Kerala State Electricity Board
- ❖ Andhra Pradesh Power Generation Corporation Limited
- ❖ Telengana State Power Generation Corporation Limited
- ❖ Sardar Sarovar Narmada Nigam Limited
- ❖ Uttarakhand Jal Vidyut Nigam Limited
- ❖ Punjab State Power Corporation Limited
- ❖ Jammu & Kashmir State Power Development Corporation Limited
- ❖ Teesta Urja Limited

22. Independent Power Producers (IPPs)

- ❖ JSW Energy
- ❖ LNJ Bhilwara Group
- ❖ Jaiprakash Power Ventures
- ❖ Tata Power
- ❖ Greenko
- ❖ Lanco Infratech
- ❖ GMR Energy
- ❖ GVK Power and Infrastructure
- ❖ Indo Arya Energy
- ❖ Everest Power
- ❖ Gati Infrastructure
- ❖ Dans Energy
- ❖ Sneha Kinetic
- ❖ Others

I would like to purchase the “Hydro Power in India 2017” report:

Format (PDF)	By August 28, 2017	After August 28, 2017
Site Licence (Single Location)	Rs 54,000	Rs 60,000
GST (18%)	Rs 9,720	Rs 10,800
Total	<input type="checkbox"/> Rs 63,720	<input type="checkbox"/> Rs 70,800
<hr/>		
Enterprise Licence (Multiple Locations)	Rs 81,000	Rs 90,000
GST (18%)	Rs 14,580	Rs 16,200
Total	<input type="checkbox"/> Rs 95,580	<input type="checkbox"/> Rs 106,200

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:

Aayushi Lahoti
 Manager- Information Products
 India Infrastructure Publishing Pvt. Ltd.
 B-17, Qutab Institutional Area, New Delhi 110016, India
 Tel: +91-11-46038153, 41034600, 41034601; Fax: +91-11-26531196
 Mobile: +91-7838751085
 Email: a.lahoti@indiainfrastructure.com