New Research Report

ROOFTOP SOLAR IN INDIA 2019

Growth Trends, Regulatory Barriers and Addressable Market

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In a significant development, in February 2019, the Indian government approved the second phase of its programme to achieve 40 GW of grid-connected rooftop solar by 2022 and announced Rs 118 billion in central government subsidies to support residential solar systems and incentivise discoms.

So far, about 4 GW of rooftop solar capacity has been installed across the country and another 3 GW has either been tendered or is in the process of being tendered. The majority of these installations are concentrated in the commercial and industrial (C&I) sector, followed by the government and institutional sectors. The residential sector has been the slowest to adopt these systems owing to various challenges. The second phase of the government's rooftop scheme is expected to provide the necessary push to all sectors, with a special focus on the residential segment.

The objective of the report is to provide a detailed assessment of the rooftop market in India including an in-depth analysis of its sub-segments; assess the key growth drivers, challenges and the impact on discoms; study the policy and regulatory framework and the market structure including the key players in the segment; analyse tariff trends and cost structures; and identify the addressable rooftop solar market for various sub-segments and provide demand projections for rooftop system components.

5. **Metering Regulations and their Implementation**
   - Key Features of Metering Policies Across States
     - Type of Metering Arrangement
     - Eligibility Criteria
     - Interconnection Voltage
     - Contracted Load Across States
     - Contracted Transformer Capacity
     - Incentives, Exemptions, Subsidies, etc.
   - Implementation Experience
   - Key Issues and Challenges
   - Emerging Metering Arrangements

6. **Tariffs, Cost Economics and Business Models**
   - State-wise Tariff Trends
   - Project Cost Economics
   - O&M Cost Trends
   - Business Models
     - Developer-led (capex, opex, lease, etc.)
     - Utility-led (community solar, on-bill financing, solar partners)
   - Economic Viability of Business Models
   - Case Studies
   - Projected IRRs

7. **Impact on Discoms**
   - Demand Side Impact
   - Supply Side Impact
   - Impact on Voltage Profiles
   - State Discoms' Approach
   - Case Studies

8. **Financing Instruments and Structures**
   - Investment Requirement
   - Modes of Financing
     - Municipal Bonds
     - Green Bonds
     - Domestic Commercial Loans/NBFCs
     - Development Finance
     - Multilateral/Bilateral Financing
     - CSR Financing
     - Project Equity
     - Etc.
   - Financing Models
   - Risks and Challenges

9. **Addressable Market for Rooftop Solar by 2024-25 (in MUs and MW)**
   - Power Demand Outlook
   - Solar Demand Outlook
   - Growth in Share of Rooftop Solar
   - Addressable Solar Market
     - By Segment
     - By State

10. **Rooftop Solar Equipment Market Outlook (upto 2024-25)**
    - Solar Inverters
    - Modules
    - Mounting Structures
    - Cables
    - Etc.

11. **Key Players (Profiles of 8-10 Developers)**
    - Current Portfolio
    - Market Share
    - Geographic Presence
    - Key Customers
    - Ongoing Projects
    - Future Plans

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