

Solar Plant Performance in India 2017-18

Rooftop Solar Market in India 2017-18

- ❖ Report (PDF)
- ❖ Data-set (Excel)

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(end-December 2017)

1. **Solar Power Sector Overview**
 - ❖ Size and Growth
 - By State
 - By Programmes/Schemes
 - By Technology
 - ❖ Key Growth Drivers
 - ❖ Emerging Market Structure
 - ❖ Recent Developments
 - Capacity Recently Allocated
 - Capacity Planned to be Allocated
 - Policy and Regulatory Updates
 - ❖ Tariff Trends
 - ❖ Assessment of Key Challenges
 - ❖ Future Outlook
2. **Review of Solar Plant Performance (2012-2017)**
 - ❖ Key Demographics
 - ❖ Overall Performance Trends
 - Year-wise Performance
 - Project Size-wise Performance
 - State-wise Performance
 - Technology-wise Performance
 - Developer Type-wise Performance
3. **Plant Performance by Year of Commissioning (2012-2017)**
 - ❖ Year-wise Distribution of Plants Tracked
 - ❖ Annual Trends in Generation/Net Exported Power
 - ❖ Annual Trends in CUF
 - ❖ Seasonality Trends
4. **Plant Performance by State (2012-2017)**
 - ❖ State-wise Distribution of Plants Tracked
 - ❖ Interstate Comparison
 - Annual Trends
 - Seasonality Trends
 - ❖ Intra-state Comparison
 - Annual Trends
 - Seasonality Trends
5. **Performance by Plant Size (2012-2017)**
 - ❖ Size-wise Distribution of Plants Tracked
 - ❖ Comparative Performance Analysis
 - < 5 MW
 - 5-10 MW
 - 10-20 MW
 - 20-50 MW
 - 50-100 MW
 - > 100 MW
6. **Plant Performance by Technology (2012-2017)**
 - ❖ Technology-wise Distribution of Plants Tracked
7. **Plant Performance by Developer Type (2012-2017)**
 - ❖ Share of Projects Tracked by Developer Type
 - ❖ Comparative Performance Analysis
 - Integrated Solar Project Developers
 - Independent Power Producers
 - Power Generation Companies
 - Diversified Players
8. **Plant Performance by Key Developers (2012-2017)**
 - ❖ Current Market Share of Key Developers
 - ❖ Share of Key Developers in Plants Tracked
 - ❖ Comparative Performance Analysis
 - ❖ Performance of Key Developers
 - ACME Solar
 - Greenko
 - SB Energy
 - Mahindra Susten
 - Fortum
 - Adani Power
 - Azure Power
 - First Solar
 - Hero Solar Energy
 - NTPC
 - Renew Power
 - Tata Power Renewable Energy
 - Shapoorji Pallonji, etc.
9. **Plant Performance by Key Module Manufacturers (2012-2017)**
 - ❖ Current Market Share of Key Module Manufacturers
 - ❖ Share of Key Module Manufacturers in Plants Tracked
 - ❖ Comparative Performance Analysis
 - ❖ Performance of Module Manufacturers
 - BHEL
 - Canadian Solar
 - First Solar
 - Hanwha
 - Moser Baer
 - ReneSola
 - Tata Power Solar
 - Trina Solar
 - Vikram Solar
 - Waaree Energies, etc.
10. **Plant Performance by Key EPC Contractors (2012-2017)**
 - ❖ Current Market Share of Key EPC Contractors
 - ❖ Share of Key EPC Contractors in Plants Tracked
 - ❖ Comparative Performance Analysis
 - ❖ Performance of Key EPC Contractors
 - Gamesa Solar
 - Lanco Solar
 - Larsen & Toubro
 - Mahindra Susten
 - Moser Baer
 - Premier Solar
 - Rays Power Infra
 - Sterling & Wilson
 - Tata Power Solar
 - Ujaas
 - Etc.
11. **Plant Performance by Key Inverter Manufacturers (2012-2017)**
 - ❖ Current Market Share of Key Inverter Manufacturers
 - ❖ Share of Key Inverter Manufacturers in Plants Tracked
 - ❖ Comparative Performance Analysis
 - ❖ Performance of Key Inverter Manufacturers
 - ABB
 - Delta
 - Hitachi
 - Huawei
 - Schneider Electric
 - SMA
 - Sungrow
 - TMEIC
 - Etc.
12. **Case Studies**

(This will include 10-12 case studies of operational solar projects covering details related to technology, vendors, location, performance analysis - seasonal and annual, plant size, implementation challenges, tariff, scheme, operational challenges, O&M practices, etc.)
13. **Database of Plants Tracked**

(This will include month-wise power generation, developer, location, size, EPC contractor, etc.)

(November 2017)

1. **Overview**
 - ❖ India's Rooftop Solar PV Potential
 - Technical Potential
 - Economic Potential
 - Market Potential
 - ❖ Current Electricity Supply Scenario
 - ❖ Current Electricity Back-up Practices
 - ❖ Size and Growth
 - By Year
 - By State
 - ❖ Key Growth Drivers
 - ❖ Current Market Structure
 - Project Developers
 - Module Manufacturers
 - Mounting Structure Manufacturers
 - Inverter Manufacturers
 - EPC Contractors
 - ❖ Key Players and Market Share
 - ❖ Barriers to Adoption of Rooftop Solar
2. **Policy and Regulatory Framework**
 - ❖ Central-level Policies and Programmes
 - ❖ Subsidies and Incentives
 - ❖ State-level Policies and Regulations
 - Current Size of Rooftop Solar Market
 - Key Features of Rooftop Solar Policies
 - Subsidies and Incentives
 - Key Features of Net/Gross Metering Regulations
 - Implementation Status of Net/Gross Metering
 - Key Issues and Challenges
 - Future Plans and Targets
3. **Business Models and their Suitability/Application**
 - ❖ Grid-connected vs. Off-grid
 - ❖ By Metering Arrangement
 - Gross Metering (Sale of Electricity to Utility) and Self-owned
 - Gross Metering (Sale of Electricity to Utility) and Third Party-owned
 - Net Metering (Self-consumption and Supply to Utility) and Self-owned
 - Net Metering (Self-consumption and Supply to Utility) and Third Party-owned
 - ❖ By Cost Structure
 - Opex/RESCO/SPAAS
 - Capex
 - Lease
4. **SECI's Rooftop Programme**
 - ❖ Implementation Model and Allocations
 - ❖ Results for Allocated Tenders
 - ❖ Summary of Phase V Rooftop Tender - 500 MW
 - ❖ Upcoming Tenders
 - ❖ Achievement-linked Incentives Scheme
 - ❖ Key Vendors
 - ❖ Issues and Challenges
5. **State-wise Tender Analysis**
 - ❖ Tenders Released Across States
 - ❖ Project Winners
 - ❖ Tariff Analysis
 - ❖ Metering Practices
 - ❖ Current Implementation Status
6. **Financing Trends**
 - ❖ Debt and Equity Options
 - ❖ Funding Strategy and Challenges
 - ❖ Recent Equity Deals
 - Private Equity
 - Strategic/Third-party Investments
 - M&A
 - ❖ Recent Debt Transactions
 - Commercial Debt
 - Multilateral/Bilateral Financing
 - Bonds
 - ❖ Funding by Government and Development Institutions
 - ❖ Future Investment Requirement
7. **Cost Economics**
 - ❖ Cost of Generation
 - ❖ Capital Cost Breakdown
 - ❖ State-wise Feasibility
 - Tariffs Discovered under State Tenders
 - Existing HT, LT and Residential Tariffs
 - APPC Rates
 - ❖ Future Outlook
8. **Project Pipeline**
 - ❖ Current Market Share of Key EPC Contractors
 - ❖ MNRE's Year-wise Rooftop Targets
 - ❖ Upcoming SECI Tenders
 - ❖ Upcoming State-wise Tenders
 - ❖ Plans of Key Rooftop Owners (Indian Railways, Ports, Airports, Corporates, etc.)
9. **Key Project Profiles**
 - ❖ Indian Railways
 - ❖ Delhi Metro Rail Corporation
 - ❖ Delhi International Airport Limited
 - ❖ Religious Organisations (Radha Soami Satsang Beas Educational and Environmental Society, etc.)
 - ❖ Corporates (Infosys, Snapdeal, Google, etc.)
 - ❖ Manufacturing Units
 - ❖ Etc.

(Each profile will include key features of rooftop solar portfolios of different types of organisations across sectors such as current operational capacity, business models, key vendors, tariff structure, metering arrangement, captive consumption, tenders, future plans, etc.)
10. **Key Developer/EPC Players Profiles**

(This chapter will include 10-12 companies in the rooftop solar space covering details related to their business models, existing and in-pipeline project portfolio, projects allotted under state and central schemes, geographical presence, future plans, O&M practices, etc.)
11. **Key Inverter Manufacturers' Profiles**

(This chapter will include 5-6 companies in the string inverter manufacturing space covering details related to their manufacturing capacity, market share, product portfolio, projects they have supplied to, O&M practices, etc.)
12. **Database of Projects Allocated under various State and Central Level Schemes**

(This database will include details pertaining to winner, tariff, project location, project size, scheduled completion, etc.)

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| Site Licence (Single Location) | Rs 48,000 | Rs 60,000 |
| GST (18%) | Rs 8,640 | Rs 10,800 |
| Total | Rs 56,640 | <input type="checkbox"/> Rs 70,800 |
| Enterprise Licence (Multiple Locations) | | |
| | Rs 72,000 | Rs 90,000 |
| GST (18%) | Rs 12,960 | Rs 16,200 |
| Total | Rs 84,960 | <input type="checkbox"/> Rs 106,200 |
| Rooftop Solar Market in India 2017-18 | | |
| Site Licence (Single Location) | Rs 40,000 | Rs 50,000 |
| GST (18%) | Rs 7,200 | Rs 9,000 |
| Total | Rs 47,200 | <input type="checkbox"/> Rs 59,000 |
| Enterprise Licence (Multiple Locations) | | |
| | Rs 60,000 | Rs 75,000 |
| GST (18%) | Rs 10,800 | Rs 13,500 |
| Total | Rs 70,800 | <input type="checkbox"/> Rs 88,500 |
| Solar Plant Performance 2017-18 + Rooftop Solar Market in India 2017-18 (15% discount on combined purchase) | | |
| Site Licence (Single Location) | Rs 74,800 | Rs 93,500 |
| GST (18%) | Rs 13,464 | Rs 16,830 |
| Total | Rs 88,264 | <input type="checkbox"/> Rs 110,330 |
| Enterprise Licence (Multiple Locations) | | |
| | Rs 112,200 | Rs 140,250 |
| GST (18%) | Rs 20,196 | Rs 25,245 |
| Total | Rs 132,396 | <input type="checkbox"/> Rs 165,495 |

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