

NOW AVAILABLE

Report on

HYDRO POWER PROJECTS - 2012

*This report is published by **India Infrastructure Research**, a sister division of **India Infrastructure** magazine.*

***India Infrastructure Research** publishes reports and newsletters for the power, oil & gas, ports & shipping, roads & bridges, telecommunications, railways, aviation, water and infrastructure finance sectors.*

Table of Contents

Part A - Overall Sector Review

1. **Executive Summary**
2. **Hydro Power Market Overview**
 - Introduction
 - Size and Growth
 - Major Players and Market Shares
 - Key Trends
 - Partnerships with Neighbouring Countries
 - Generation Economics and Tariffs
 - Risks and Challenges
 - Capacity Addition and Future Outlook
3. **Recent Developments**
 - Introduction
 - Capacity Addition
 - Projects
 - Investments
 - Policy and Regulation
 - Environmental Status and Clearances
 - Summing Up
4. **Existing Projects Capacity Analysis**
 - Introduction
 - Capacity by State
 - Capacity by Sector
 - Capacity by Size
 - Capacity by Vintage
 - Capacity by Generation Performance
 - Capacity by Equipment Make
 - Summing Up
5. **Upcoming Projects Capacity Analysis**
 - Introduction
 - Capacity by Sector
 - Capacity by State
 - Capacity by Size
 - Capacity by Expected Commissioning
 - Capacity by Cost per MW
 - Conclusion

6. **Project Cost Analysis**
 - Introduction
 - Past Cost Trends
 - Cost Analysis of Upcoming Projects
 - Equipment and Civil Construction Cost Trends
 - Summing Up
7. **Tariff Analysis**
 - Introduction
 - Historical Analysis
 - Tariffs of Existing/Operational Projects
 - Tariffs for Upcoming Projects
 - Conclusion
8. **Update on Financing and Investment**
 - Introduction
 - Investment Requirements
 - Lenders' Perspective
 - Recent Financing Experience
 - Key Issues and Concerns
 - Conclusion
9. **Critical Success Factors**
 - Introduction
 - Key Success Factors
 - Select Project Profiles
10. **Future Outlook**
 - Introduction
 - Drivers of Future Demand
 - Hydro Potential
 - Project Pipeline and Capacity Addition Outlook
 - Plans and Investment
 - Risks and Challenges
 - The Way Forward

Part B - Hydro Project Profiles

11. **Profiles of Projects under Construction**
 - Introduction
 - Project Profiles
12. **Projects under Survey and Investigation: Key Data**
 - Introduction
 - Status of Hydroelectric Schemes under S&I

13. Operational Projects: Key Data

- Introduction
- Project Profiles
 - Central Sector
 - State Sector
 - Private Sector

Part C - Key Player Profiles

14. **Key Player Profiles**
 - Introduction
 - Central Sector
 - NHPC Limited
 - NHDC Limited
 - Bhakra Beas Management Board
 - SJVN Limited
 - THDC India Limited
 - NEEPCO Limited
 - Damodar Valley Corporation
 - State Sector
 - AP Genco Limited
 - Karnataka Power Corporation Ltd.
 - Mahagenco Limited
 - Tamil Nadu Generation and Distribution Corporation
 - Odisha Hydro Power Corporation Ltd.
 - Kerala State Electricity Board
 - Sardar Sarovar Narmada Nigam Ltd.
 - Uttarakhand Jal Vidyut Nigam Ltd.
 - Punjab State Power Corporation Ltd.
 - Private Sector
 - Jaiprakash Power Ventures Limited
 - Tata Power
 - Bhilwara Energy Limited
 - Everest Power Private Limited

15. Appendix

List of Tables and Figures

LIST OF TABLES

Estimated Hydro Power Potential
Hydro Power Projects Commissioned in 2011-12 and 2012-13 (up to June 2012)
Key Players and Market Shares (as of July 2012)
Key Financials of Select Hydro Power Companies
Projects Allotted to Private Sector for which Construction is yet to be Started
Expected Capacity Addition from Private Hydro Projects
Snapshot of Hydro Projects Affected Due to Environmental Issues
Hydro Projects under 50,000 MW Initiative held up due to Non-availability of MoEF Clearance
Operational Hydro Projects under Indo-Bhutan Cooperation
Hydro Projects Currently being Developed under Indo-Bhutan Cooperation
List of New Hydro Projects to be Commissioned in Bhutan by 2020
Hydro Capacities Scheduled to be Commissioned during 2012-13
Hydro Projects Commissioned during 2011-12
Hydro Power Projects Awarded Environmental Clearance between May 2009 and August 2012
List of Hydro Projects Awaiting Grant of E.C. as on August 31, 2012
Hydro Projects Awaiting Grant of ToR as on August 31, 2012
Region-wise Details of Hydroelectric Stations with Capacities of 25 MW and Above
Hydro Power Performance-Generation and Availability (2006-07 to 2010-11)
Hydro Power Generation during 2011-12 (MUs)
State-wise Installed Hydro Capacity
Sector-wise Hydro Electricity Generation during 2011-12
State Sector Capacities in Hydro Power
Private Sector Projects in Hydro Power
Hydro Projects across Capacity Size in Top 10 States
Profile of Projects in State Sector based on Size
Growth in Hydro Power Generation
Hydro Power Generation Performance by Company
Hydro Installed Capacity by Turbine and Generator Make (Country)
Hydro Installed Capacity by Turbine and Generator Make (Company)
Upcoming Hydro Capacity in the Central Sector
Upcoming Hydro Capacity in the State Sector
Upcoming Hydro Capacity in the Private Sector
Details of Hydro Power Projects Commissioned between 1992 and 2012
Size Distribution of Upcoming HEPs by Number of Projects and Capacity
Size Distribution of Upcoming HEPs by Aggregate Costs
Sector-wise Distribution of Aggregate Costs of Upcoming Projects
State-wise Distribution of Upcoming HEPs
State-wise Distribution of Upcoming HEPs by Aggregate Costs
Cost-wise Distribution of Upcoming HEPs
Hydro E&M Equipment Contracts Won by BHEL in the Eleventh Plan Period
Capacity of Hydro Projects in different Tariff Ranges

Sector-wise Tariffs of Hydro Power Projects
Capacity Distribution of Hydro Power Projects by Vintage by Tariff (MW)
Distribution of Capacity of Hydro Power Projects by Tariffs (MW)
Distribution of Capacity of Hydro Power Projects by Type by Tariff (MW)
Expected Tariffs of Select Upcoming Projects
Private Sector Hydro Power Projects Yet to Achieve Financial Closure (as of July 31, 2012)
Project Management Risks in Hydro Power Projects
List of Key Financial Closures for Hydro Projects during September 2006 - August 2012
Electricity Demand and Shortages in India
Key Players based on Hydro Capacity under Construction
Hydroelectric Schemes under Survey and Investigation
Basin-wise Pooling Stations Identified in the Northeastern Region for Evacuation from Hydro Projects
Snapshot of Trans-Arunachal Highway Package Projects under Survey & Investigation (outside of the 50,000 MW Hydroelectric Initiative)
Projects under Survey & Investigation (50,000 MW Hydroelectric Initiative)
NHPC Limited's Installed Capacity
NHPC Limited's Twelfth Plan Projects under Construction
NHPC's Projects in other Stages of Implementation
NHPC Limited's Financials
NHDC Limited's Existing Projects
NHDC Limited's Financials
BBMB's Installed Capacity
SJVNL's Future Projects
SJVNL's Financials
THDC India Limited's Future Projects
THDC India Limited's Financials
NEEPCO's Existing Hydro Plants
NEEPCO's Projects under Construction
NEEPCO's Projects in Planning Stage
NEEPCO's Financials
DVC's Existing Hydro Plants
DVC's Financials
AP Genco's Existing Hydro Projects
AP Genco's Projects under Implementation
AP Genco's Financials
KPCL's Existing Hydro Projects
KPCL's Future Hydro Projects
KPCL's Financials
Mahagenco's Existing HEPs with over 25 MW capacity
Mahagenco's Financials
TANGEDCO's Existing Hydro Power Projects
TANGEDCO's Completed RM&U Works
TANGEDCO's RM&U Works in Pipeline
TANGEDCO's Financials
OHPC's Existing Hydro Projects
OHPC's Upcoming Projects
OHPC's Financials
KSEB's Existing Hydro projects of 25 MW and Above Capacity
KSEB's Future Projects

KSEB's Financials
UJVNL's Existing Hydro Projects
UJVNL's Existing Hydro Projects of 25 MW and above Capacity
UJVNL's Upcoming Hydro Projects
UJVNL's Financials
PSPCL's Existing Projects
PSPCL's Future Projects
PSPCL's Financials
JPVL's Existing Hydro Projects
JPVL's Future Hydro Projects
JPVL's Financials (Rs billion)
Tata Power's Existing Hydro Projects
Tata Power's Financials
BEL's Financials

LIST OF FIGURES

Existing Hydro Power Capacity in India by Region
Hydro Power Generation during 2011-12
Trend in Hydro Power Capacity
Year-wise Capacity Addition during Eleventh Plan
Hydro Capacity Addition Feasible as per CEA
Sector-wise Share in Installed Capacity
Capacities of Central Sector Companies in Hydro Power
Profile of Projects in Central Sector based on Size
Profile of Projects in Private Sector based on Size
Percentage Distribution of Hydro Capacity across Age
Vintage of Hydro Plants Based on Capacity (MW) of Project
Upcoming Hydroelectric Project Capacity (MW)
State-wise Share of Upcoming Hydro Projects
Upcoming Project Capacities by Size and Sector
Upcoming Capacities of Hydro Projects as per Date of Commissioning (MW)
Capacity Slippage from the Eleventh Plan (MW)
Cumulative Capacity Additions on Cost per MW Basis (MW)
Comparison of Average Cost per MW in Different Plan Periods
Comparison of Average Cost per MW in Different Project Classes
Comparison of Average Cost per MW in Different Sectors
Comparison of Average Cost per MW in Different States
Comparison of Average Cost per MW in Delay in Project Execution
Percentage Change in Project Tariffs between 2008-09 and 2012-13
Trend in GDP Growth
Total Emissions from Power Sector
Hydro Power Potential yet to be Developed in Key States (MW)
Hydro Capacity Addition Targets as per the Working Group on Power for 12th Plan
Year-wise Expected Capacity Addition during the Twelfth Plan Period (MW)
Private Sector Hydro Projects Allotted by States yet to Commence Construction
Funding Requirement for Hydro Power during Twelfth Plan (Rs billion)
Developer-wise Contribution to Capacity under Construction

Release Date: 21, September 2012 No. of pages: 435

Order Form

I would like to purchase the "Hydro Power Projects-2012" report:

Format (PDF)	Report Price	Service tax (12.36%)	Total
Site Licence (Single Location)	Rs 45,000	Rs 5,562	<input type="checkbox"/> Rs 50,562
Enterprise Licence (Multiple Locations)	Rs 67,500	Rs 8,343	<input type="checkbox"/> Rs 75,843

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 Royal Bank of Scotland N.V.
Bank Address : M-6, Hauz Khas, New Delhi 110016, India
Account No. : 1050338
Swift Code : ABNAINBBDEL
IFSC Code : ABNA0100327

Contact details:

Deepali Mahajan
Assistant Manager, Information Products
India Infrastructure Publishing Pvt. Ltd.
B-17, Qutab Institutional Area, New Delhi - 110 016. India
Tel: +91 11 46038153, 41034600/01 Fax: +91 11 2653 1196
Mobile: +91 9971407082
deepali.mahajan@indiainfrastructure.com