

TWO NEW REPORTS ON THE POWER SECTOR

TRANSMISSION IN INDIA 2014

DISTRIBUTION IN INDIA 2014

Transmission in India 2014

Draft Table of Contents (2 Volumes; 450+ pages)

SECTION A: Macro Analysis of the Transmission Sector in India

1. **Executive Summary**
2. **Network Size and Growth**
 - Interstate network growth (by voltage)
 - Line length
 - MVA capacity
 - Intra-state network growth (by voltage)
 - Line length
 - MVA capacity
 - Key Growth Drivers
3. **Recent Developments (Last 12 Months)**
 - Private Sector Participation
 - Progress on the National Grid
 - Recent Regulations
 - Technology Trends
 - Smart Grid Initiatives
4. **The National Grid**
 - Historical Review
 - Current Status
 - Expected Integration of the Southern Grid with NEW Grid
 - The Advantages of the National Grid
5. **Interstate Comparison**
 - Transformer Capacity
 - Transmission Lines
 - Number of Substations
 - Transmission Losses
 - Capex
6. **Private Sector Participation**
 - Competitive Bidding Experience
 - Projects by Independent Private Transmission Companies
 - Interstate
 - Intra-state
 - Interstate Projects in JV with Powergrid
 - Dedicated Transmission Lines
 - Issues and Challenges
7. **Regulatory Framework**
 - Key Regulations
 - Impact of Regulations
 - Issues and the Way Forward
8. **Transmission Tariffs**
 - Transmission Pricing – Point of Connection Method
 - Tariffs of Central Sector Transcos
 - Tariffs of State Sector Transcos

9. **High Capacity Transmission Corridors**
 - Interregional Transfer Capacity
 - Proposed High Capacity Transmission Corridors
 - Current Status
 - Future Outlook
10. **Integration of Renewable Energy**
 - Current Status
 - State-wise Plans to Augment Renewable Power Evacuation Capacity
 - Investment Requirement
 - Issues and Challenges
 - The Way Forward
11. **Capital Expenditure**
 - Investment Requirements
 - Trends in Capex of Transcos
 - Key Initiatives
 - Capex Plans
12. **Equipment Requirements and Projections**
 - Transformers
 - Conductors
 - Towers
 - Insulators
13. **Key Contracts and Orders**
 - EPC/Turnkey Contracts
 - Equipments Packages
 - Transformers
 - Conductors
 - Towers
 - Insulators
 - Reactors
14. **Technology Trends**
 - Move towards EHV/UHV
 - Conductors
 - Towers
 - Insulators
 - WAMS and PMUs
 - URTDMS
15. **Future Outlook**
 - Network Expansion
 - Investments
 - Private Participation
 - Policy and Regulatory Outlook
 - Technology Trends

SECTION B: Detailed Analysis of Transcos through Company Profiles

Each profile will include key facts about the company, transmission network details (capacity, line length, substations and capacitors), transmission losses, expenditure, planned projects, key contacts, etc.

16. **Central Transmission Utilities**
 - Power Grid Corporation of India Limited
 - Damodar Valley Corporation
 - Bhakra Beas Management Board
17. **State Transmission Utilities**
 - Maharashtra (MSETCL)
 - Gujarat (GETCO)
 - Uttar Pradesh (UPPTCL)
 - Andhra Pradesh (APTransco)
 - Tamil Nadu (TNTCL)
 - Rajasthan (RRVNL)
 - Karnataka (KPTCL)
 - Madhya Pradesh (MPPTCL)
 - Haryana (HVPNL)
 - Punjab (PSTCL)
 - West Bengal (WBSETCL)
 - Kerala (KSEB)
 - Delhi Transco
 - Orissa (OPTCL)
 - Chhattisgarh (CSPTCL)
 - Jammu & Kashmir (JKPDD)
 - Uttarakhand (PTCUL)
 - Bihar (BSPTCL)
 - Assam (AEGCL)
 - Himachal Pradesh (HPPTCL)
 - Jharkhand (JSEB)
 - Meghalaya (MePTCL)
 - Tripura (TSECL)
18. **Private Transmission Companies**
 - Reliance Infrastructure; Sterlite Technologies; Raichur Sholapur Transmission Company; Powerlinks Transmission; Jaypee Powergrid; Torrent Power Grid; Teestavalley Power Transmission; North East Transmission Company; Jaigad Power Transco; Jhajjar KT Transco; Adani Power; Essar Power Transmission Company; Others

SECTION C: Transmission Projects Analysis

19. **Analysis of Project Pipeline**
 - Project Scope; Capacity; Cost; Location; Current Status; Expected Completion Date

20. **Appendix**

Distribution in India 2014

Draft Table of Contents (2 Volumes; 500+ pages)

SECTION A: Macro Analysis of the Distribution Sector in India

1. **Executive Summary**
2. **Sector Size and Growth**
 - Distribution Line Length
 - Transformer Capacity
 - Energy Volume and Consumer Base
 - AT&C Losses
 - Key Growth Drivers
 - Issues and Challenges
3. **Recent Developments (Last 12 Months)**
 - New Standard Bidding Documents (Case I and Case II)
 - Financial Restructuring Package
 - Tariff Revisions
 - Network Growth
 - Recent Case I/Case II Biddings
 - Franchisee Appointments
 - Smart Grid Pilots
4. **Inter-Discom Comparison**
 - Distribution Network
 - Transformer Capacity
 - Substations
 - Metering Status
 - AT&C Losses
 - Consumer Profile
 - Number of Consumers
 - Financial Performance
5. **Discom Finances and Financial Restructuring Package**
 - Revenue, Cost and Profitability Trends
 - Accumulated Debt of Distribution Utilities
 - Update on FRP
 - Expected Impact of FRP on Discom Performance
6. **Tariff Trends**
 - Domestic Tariffs
 - Industrial Power Tariffs
 - Tariff Revisions during 2013-14
 - Adoption of kVAh-based Tariffs
 - Cross-subsidisation
7. **Power Purchase Costs and Competitive Bidding**
 - Trend in Power Purchase Costs
 - Key Drivers for Power Purchase Costs

- Recent Case I / Case II Bidding
- New Standard Bidding Documents for Case I and Case II Bidding
- Short-term Power Market Trends

8. Discoms' Capex

- Investment Needs
- Capex Trends
- Planned/Projected Capex
- Key Elements of Capex

9. Equipment Requirement Projections

- Transformers
- Capacitors
- Energy Meters
- Switchgear

10. Update on R-APDRP

- Programme Overview
- Status and Progress
- Key Implementation Agencies
- Major Challenges
- The Way Ahead

11. Update on Distribution Franchise Model

- Distribution Franchise Model
- Experience So Far
- New Franchises Awarded
- Future Plans

12. Technology Trends

- Key Equipment
- Network Management
- Metering, Billing and Collection
- IT and ITES
- Others

13. Smart Grids

- Smart Grid Roadmap
- Pilot Projects
- Key Functionalities to be Evaluated
- The Way Forward

14. Future Outlook

- Network Expansion
- Investment
- Power Procurement Costs
- Tariffs
- Discom Finances

SECTION B: Detailed Analysis of Discoms by State through Company Profiles

Each profile will include operational area, current infrastructure, operating and financial performance, trend in AT&C losses, and future plans including projects and capex, etc.

15. Discom Profiles by State

- Andhra Pradesh (APCPDCL, APSPDCL, APEPDCL, APNPDCCL)
- Assam (APDCL)
- Bihar (NBPDCCL, SBPDCL)
- Chhattisgarh (CSPDCL)
- Delhi (BRPL, BYPL, TPDDL)
- Gujarat (PGVCL, UGVCL, MGVCL, DGVCL, Torrent Power)
- Haryana (UHBVN, DHBVN)
- Himachal Pradesh (HPSEB)
- Jammu & Kashmir (JKPDD)
- Jharkhand (JSEB)
- Karnataka (BESCOM, HESCOM, GESCOM, CESCO, MESCOM)
- Kerala (KSEB)
- Madhya Pradesh (MP Paschim, MP Poorv, MP Madhya)
- Maharashtra (MSEDCL, Rlnfra, Tata Power, BEST)
- Meghalaya (MePDCL)
- Orissa (CESU, WESCO, NESCO, SOUTHCO)
- Punjab (PSPCL)
- Rajasthan (JVVNL, AVVNL, JdVVNL)
- Tamil Nadu (TANGEDCO)
- Tripura (TSECL)
- Uttarakhand (UPCL)
- Uttar Pradesh (UPPCL, KESCo, NPCL)
- West Bengal (WBSEDCL, CESC, DPSC)

16. Appendix



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