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# OPERATIONAL AND FINANCIAL PERFORMANCE OF DISCOMS

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## The report covers:

- ❖ Distribution sector trends and developments
- ❖ Impact of COVID-19 on Power Distribution
- ❖ Analysis on key operational and financial performance parameters across over 50 discoms
- ❖ Inter-discom comparison for critical performance analysis across the public and private sectors
- ❖ Operational and capital costs
- ❖ Tariff Trends

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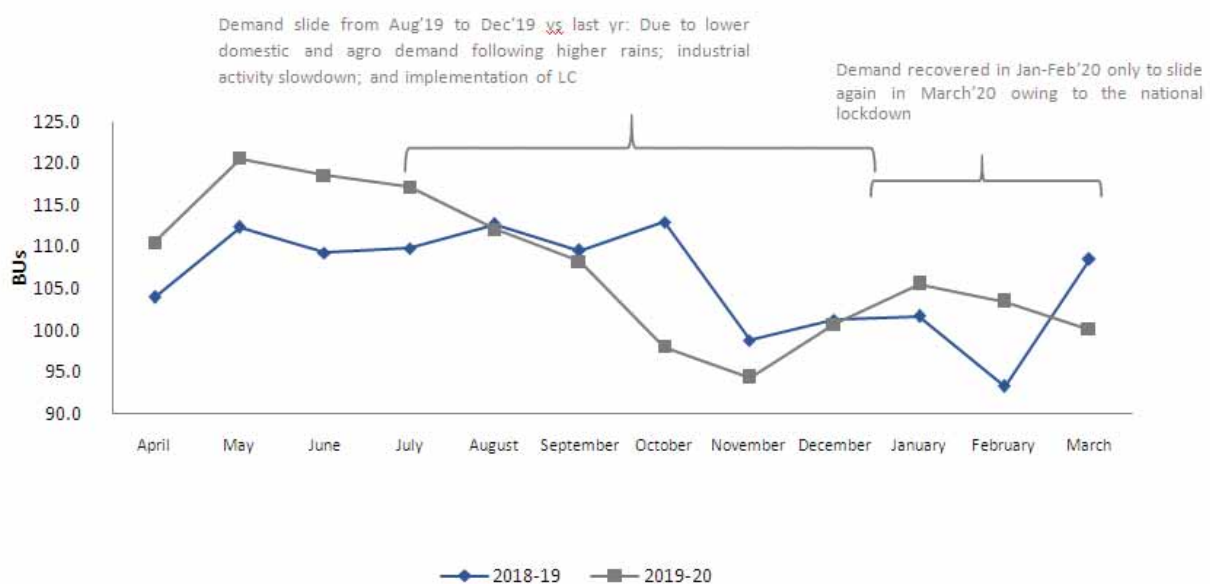
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**INDIA INFRASTRUCTURE RESEARCH**

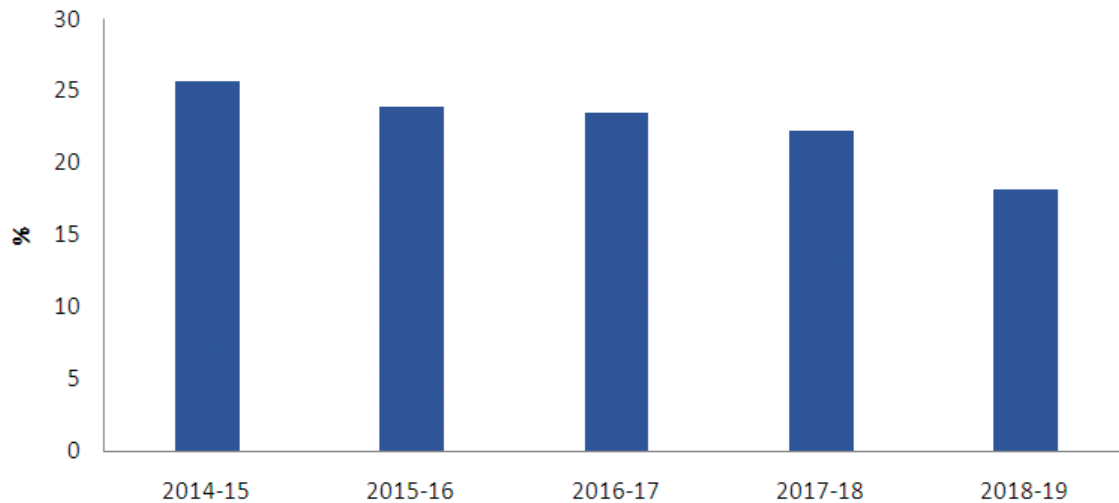
# OPERATIONAL AND FINANCIAL PERFORMANCE OF DISCOMS

- ◆ The power distribution network has witnessed significant growth over the past five years. As per India Infrastructure Research, the distribution line length and transformer capacity have increased at an estimated CAGR of 4% and 7%, respectively. Discom-wise, TANGEDCO and MSEDCL have the highest line length and transformer capacity.
- ◆ The discoms' consumer base has also been increasing steadily. As per the data collected by India Infrastructure Research, the total electricity consumers are expected to be around 278 million as of March 2019, recording a CAGR of 5% in the last five years.
- ◆ On the AT&C loss front, at the all-India level there has been a steady decline during the last five years, from 25.72% in 2014-15 to 18.19% in 2018-19. However, it continues to be higher than the target of 15% set under Ujwal DISCOM Assurance Yojana (UDAY). The progress in AT&C loss reduction has been skewed across states. While some states have managed to achieve the 15% target, various others have AT&C losses of around 30%.
- ◆ High book losses of discom is another cause of concern for the segment. Under the UDAY, the cumulative book losses of discoms declined from Rs 515 billion in 2015-16 to Rs 150 billion in 2017-18 - a whopping 70% decline. However, the losses increased by a hefty 80% to Rs 270 billion in 2018-19 over 2017-18.
- ◆ The country-wide lockdown has taken a toll on power demand as industrial and commercial establishments have halted operations. Given industrial (40%-42%) and commercial (8%-10%) consumers constitute 45%-55% of the overall power demand, the shutdown of industrial establishments has led to a considerable decline in the power demand.
- ◆ The C&I segment is one of the largest contributors to the discom revenues, primarily because of the high tariffs levied on consumers. Therefore, the discom revenues stand to be hit hard by the lack of demand in this specific segment. India Infrastructure Research has estimated the revenue loss for discoms through three different scenarios tracking the route taken by the COVID-19 pandemic across these months in its report on Operational and Financial Performance of Discoms'.

## Month-on-Month Energy Demand (2018-19 vs 2019-20)



### Trend in AT&C Losses



## About India Infrastructure Research

India Infrastructure Research is a division of India Infrastructure Publishing, a company dedicated to providing information on the infrastructure sectors through magazines, conferences, newsletters and research reports. We have 22 years of experience in tracking and analysing infrastructure sectors and publish about 35 plus multi-client reports in the areas of power, renewable energy, oil & gas, ports & shipping, roads & bridges, urban infrastructure, telecommunications, aviation, railways, water, health, housing, banking and infrastructure finance. We also publish six magazines - Power Line, Indian Infrastructure, Renewable Watch, tele.net, Gujarat infrastructure and Smart Utilities and have two online databases - [www.indiainfra-monitor.com](http://www.indiainfra-monitor.com) (covering all infrastructure projects with investments of over Rs 1 billion) and [www.indiapowerregulation.com](http://www.indiapowerregulation.com) which provides information on the regulatory developments in the Indian electricity sector. India Infrastructure offers custom research services as well, drawing on our staff of almost four dozen infrastructure research analysts.

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  - ❖ Recent Developments Impacting Tariffs
  - ❖ Trends in Cross-subsidy Surcharges

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