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12th Annual Conference on

SOLAR POWER In India

New Avenues and Opportunities, Key Challenges and Solutions

June 27-28, 2019, Le Meridien, New Delhi

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SOLAR POWER IN INDIA

Mission

- The country's solar power sector has taken off in a way that most people would not have predicted. From an almost non-existent solar market in 2010, India today is home to the fifth largest installed solar power generation capacity in the world. Over these years, the solar sector has changed dramatically, in terms of issues, challenges and opportunities.
- The most significant change is that the majority of the new capacity being planned or developed in the power sector is in the form of solar. Solar parks have emerged as a successful model. Solar-wind hybrid projects have started being set up on a commercial scale. Floating and canal-top PV have met with success amid land-related constraints. Finally, the rooftop solar segment has started looking up, especially in the commercial and industrial space.
- The policy and regulatory landscape has also evolved significantly. Competitive bidding has become a standard practice. All states have solar power policies and net metering regulations in place. Some states also have focused rooftop, solar hybrids and floating solar policies. RPO trajectories have been defined in line with national targets.
- However, the sector faces a number of policy and regulatory uncertainties and institutional challenges. Land and transmission constraints and macroeconomic issues have also slowed down the rate of growth of late. So much so that the targets set for 2018-19 are far from being met.
- The discoms' health has improved post UDAY, but only marginally and variably. These utilities continue to be the weakest link in the power chain despite the fact that PPA bankability rests mostly on their financials.
- With solar energy gaining ground and emerging as a key source of power to address peak load challenges, having a robust power transmission system has become critical. It is imperative to develop evacuation infrastructure for solar power within a crunched timeline and at lowest costs.
- The financing scenario can at best be termed weak with an overall high-risk sentiment. The industry seemed to have a false start with a series of consolidations and IPOs being announced early in the year. However, owing to an expectation mismatch between the sellers and the buyers, most of these fell through. Several large IPPs too faced disappointments and delays in their IPOs.
- The country's macroeconomic scenario is not at its best. Interest rates are increasing and the Indian currency has depreciated significantly, adding to the woes of developers and financiers. The only silver lining is that oil prices have gone up, making for a stronger case to move to renewable-powered EVs.
- Amidst the aforementioned worries and uncertainties, the stage has been set for new opportunities. And the majority of the growth in solar is yet to come, given that the country has to reach 100 GW of solar capacity by 2022. Solar parks, rooftop solar, energy storage, floating PV, solar hybrids and EVs will dominate the agenda next year.
- The mission of this conference is to examine the new trends and opportunities in the sector, discuss the impact of recent policy and regulatory initiatives, assess the lingering risks and challenges, and showcase the latest innovations, most promising technologies and noteworthy projects. The conference will also provide a platform to project developers, EPC companies and technology providers to share their experiences and exchange ideas.

Target Audience

The conference is targeted at:

- | | | |
|---------------------------------|-----------------------------|---|
| - Project Developers | - Equipment manufacturers | - Power Utilities (Discoms, Transcos, Gencos) |
| - EPC Providers | - PV manufacturers | - Energy storage experts |
| - Policy Makers | - System Integrators | - R&D institutions |
| - Regulatory agencies | - Power Exchanges | - Law Firms |
| - Independent Power Producers | - Technology providers | - Investors |
| - Rooftop solar developers | - Consultancy organisations | - Financial institutions |
| - Conventional power developers | - Captive power consumers | - Etc. |

New Avenues and Opportunities, Key Challenges and Solutions

AGENDA/STRUCTURE

KEY TRENDS AND OUTLOOK

- ❖ What are the key highlights and opportunities in the solar sector in India?
- ❖ What are the tariff trends across the utility-scale rooftop, floatovoltaics and solar hybrid segments?
- ❖ What are the lingering and new concerns? What is the way forward?

MNRE'S PERSPECTIVE

- ❖ What have been the MNRE'S key initiatives to scale up solar power?
- ❖ What has been the impact of recent policy moves? What are the challenges facing the industry?
- ❖ What are the upcoming policy initiatives in this space?

SOLAR TENDERING TRAJECTORY: SECI'S PLANS AND INITIATIVES

- ❖ How is SECI ensuring the timeline under the new solar tendering trajectory?
- ❖ What has been the response to SECI's initiatives in the rooftop, hybrid, floatovoltaics and energy storage space?
- ❖ What are the emerging tariff and participation trends across these tenders? What is the outlook?

EMERGING REGULATORY SCENARIO

- ❖ What is the status of implementing the forecasting and scheduling norms?
- ❖ How will the must-run status and imposition of transmission and wheeling charges impact solar projects?
- ❖ What are the other regulatory gaps? How are these being addressed?

DEVELOPERS' CONCLAVE

- ❖ What is the developer outlook for the solar market? What are the key concerns?
- ❖ What are their investment plans and strategies to meet future demand?
- ❖ What are their expectations from the government and other stakeholders?

STATE FOCUS

- ❖ What have been the key policy and regulatory initiatives across states? What is the development status?
- ❖ What are the emerging opportunities for private developers?
- ❖ What are the main challenges and how can these be addressed?

ROOFTOP SOLAR

- ❖ What have been the growth trends across the government, institutional, C&I and residential segments?
- ❖ How has the cost economics evolved? What are the major policy and regulatory gaps?
- ❖ What is the future outlook across segments? Is 40 GW achievable by 2022?

SOLAR OPEN ACCESS: POTENTIAL AND CHALLENGES

- ❖ What is the current state of solar open access implementation and adoption across states?
- ❖ What steps should be taken for its larger acceptance and adoption?
- ❖ What would it take to realistically create a win-win situation for both the industry and discoms?

SOLAR HYBRIDS

- ❖ What has been the experience of solar-wind and other hybrid solar set-ups in India?
- ❖ What is the cost economics?
- ❖ What are the key challenges? What is the future outlook?

POWERING AGRICULTURE THROUGH SOLAR

- ❖ What is the market size and outlook for solar pumps in India?
- ❖ What are the benefits and challenges of schemes like Maharashtra's solar agriculture feeder programme?
- ❖ What is the cost economics? What are the likely savings?

SOLAR IN SMART CITIES

- ❖ What is the potential of solar power in smart cities in India? What are the key applications?
- ❖ What are the ongoing initiatives in this regard?
- ❖ What is the future outlook?

ROLE OF SOLAR IN POWERING FUTURE TRANSPORTATION

- ❖ What is the potential for solar in powering airports, ports, railways, MRTS, electric vehicles, etc.?
- ❖ What are the ongoing initiatives and plans?
- ❖ What are the potential challenges? What are the possible solutions?

FLOATOVOLTAICS

- ❖ What has been the experience in setting up and operating canal-top and floating solar plants?
- ❖ How has the cost economics evolved? What are the emerging technologies?
- ❖ What is the future outlook?

ENERGY STORAGE TO CHANGE SOLAR DYNAMICS

- ❖ What are the key initiatives being taken by the government and the industry to promote storage?
- ❖ What are the key cost and technology trends in the power storage space?
- ❖ What will be the growth drivers to reduce costs? What is the market outlook?

SOLAR PV MANUFACTURING

- ❖ What is the current domestic manufacturing scenario in India?
- ❖ What is the manufacturers' perspective on the manufacturing-linked solar tenders?
- ❖ What are the key challenges and possible solutions?

BoS FOR SOLAR PLANTS: FOCUS ON INVERTERS

- ❖ What are the cost and technology trends for solar inverters?
- ❖ What are the emerging efficiency improvement practices?
- ❖ What are the operational challenges? What is the outlook?

SOLAR ASSET MANAGEMENT: MAXIMISING PLANT OUTPUT AND REVENUE

- ❖ What has been the developers' and O&M service providers' on-the-ground experience so far?
- ❖ What are the key challenges encountered? What are the best practices? How is the cost emerging?
- ❖ What is the role of automation in solar O&M? How can AI help in improving plant performance?

SMART SOLAR: USE OF BLOCKCHAIN TECHNOLOGIES

- ❖ What are the most promising use cases of blockchain in solar and what stage of development are these at?
- ❖ What is their potential in India? What are the major roadblocks in their commercial adoption?
- ❖ What is the investors' perspective on financing the development and commercialisation of blockchain-based solutions?

GREEN POWER MARKET

- ❖ Is it time to have a dedicated marketplace for solar power in India?
- ❖ What would be the challenges in setting up and operating such a market?
- ❖ What will be the likely impact on various stakeholders?

LEGAL & INSTITUTIONAL CHALLENGES: FOCUS ON PPA BANKABILITY

- ❖ What are the legal issues at different stages of project development?
- ❖ What are the key PPA risks faced by developers?
- ❖ Are PPAs with discoms more bankable than those with third-party users?

Previous Participants

The participants in our previous conferences on "Solar Power in India" include: ABB India, Accenture, ACME, Adani Ennore Container Terminal, Adani Green Energy, Adani Ports & SEZ, Aditya Birla Management Corporation, Amara Raja, Amplus Solar, Angellique International, Applied Solar, Arctech Solar, Avaada, Bharat Petroleum Corporation, Bridge To India Energy, Bureau of Energy Efficiency, C&S Electric, C.R.I. Pumps, Canadian Solar, CESC, Clean Max Solar, Cleantech Solar, CLP India, Corning Technologies, Coslight, Care Ratings, Customized Energy Solutions, Dakshinanchal Vidhyut Vitran Nigam, Damodar Valley Corporation, Daqo New Energy, DLF Power & Services, Emergent Ventures, Enerparc Energy, Engineering Projects India, Enrich Energy, Essel Green Energy, Exide Industries, First Solar, FNP Power Systems, Fortum, Fronius, FUSERC, Gamesa, GE, Gensol Consultants, Genus Innovation, GIZ, GMR Energy, Good We Power Supply, Greenko Group, Grid Corporation of Odisha, GSES India Sustainable Energy, Gujarat Electricity Regulatory Commission, Gujarat Energy Transmission Corporation, Gujarat State Electricity Corporation, GVFL, HAREDA, Hareon Solar, Haryana Power Generation Corporation, Hero Future Energies, Huawei Telecommunications, ICFI, ICICI Bank, ICRA, Idam Infrastructure Advisory, IDBI Bank, IDFC, IFCI, IFFCO, IIFCL, IL&FS Energy Development Company, India Electronics Semiconductor Association, India Energy Forum, India Infradebt, India Infrastructure Finance Company, Indian Energy Exchange, Indian Oil Corporation, Indus Towers, Induslaw, Infrastructure Development Corporation Karnataka, International Advanced Research Centre for Powder Metallurgy and New Materials (ARCI), International Copper Association India, Intertek, IRADe, IREDA, IREDA, Jakson & Company, Jinkosolar, JSW Steel, Kaco New Energy, Kalpa Power, KEI Industries, Kirloskar Electric Company, KPMG, KSTAR, L&T Infra Debt Fund, L&T Infrastructure Finance, Lara Global, Larsen & Toubro, Luminous Power Technologies, Madhya Gujarat Vij Company, Maharashtra Energy Development Agency, Maharashtra State Power Generation Company, Maharishi Solar Technology, Mapletree Property, Maruti Suzuki India, McNally Bharat Engineering Company, Megawatt Solutions, Meyer Burger India, Microtek International, Ministry of New and Renewable Energy, Ministry of Power, Mitsubishi Chemicals, MMRDA, Moser Baer Solar, NAIR, NEC Technologies, NEDO, NEEPCO, Nelco, Nextech Electronics, NHDC, NIMOTO Solar, Nippo, Niti Aayog, NSEFI, NTPC, One Indiabulls Centre, ONGC, Optimum Tracker, Phono Solar, Portolan Solutions, POSOCO, Power Grid Corporation, Power One Microsystem, Praxair, Punjab Energy Development Agency, PWC, RAL, RDSO, ReGen Powertech, Renewable Energy Corporation, Renewsys India, Ru-arch Power, Rural Electrification Corporation, Sailax, SECI, Secure Meters, Sembcorp Green Infra, SESI, Shimato Enterprises, Siemens, SJVN, Societe Generale, Solairedirect Energy, Solgen Energy, Sprng Energy, Sterling & Wilson, Sungrow Power Supply, Suntech Power, Suzlon Energy, Swelect Energy Systems, Tata Power Solar Systems, Tata Steel, TBEA Xian Electric Technology, Telecom Network Solutions, TerraForm Global, The Yash Birla group, Tikona Digital Networks, Tritronics, Ujaas Energy, Uttar Pradesh Electricity Regulatory Commission, Varroc Engineering, Vertiv, Vikram Solar, Vindhya Tele Links, Voltamp Transformers, VS Saurya EnerTech, Waaree Energies, Welspun Renewables Energy, Zamil Infra, Znshine Pv-Tech, etc.

PREVIOUS SPEAKERS

Anand Kumar,
Secretary,
Ministry of New Renewable Energy

Jatindra Nath Swain,
Managing Director,
Solar Energy Corporation of India

A.K. Juneja,
Executive Director,
NTPC

Shailendra Shukla,
Chairman, Department of Renewable Energy,
Government of Haryana

Dr Vipin Sharma,
Director General,
Maharashtra Energy Development Agency

Sujoy Ghosh,
Country Head- India,
First Solar Power India

Sanjay Aggarwal,
Chief Executive Officer,
Fortum India

Sunil Jain,
Chief Executive Officer and Executive
Director, Hero Future Energies

Ashish Khanna,
CEO&ED,
Tata Power Solar

K.N. Subramaniam,
Chief Executive Officer,
Moser Baer Solar

Satish Mandhana,
Managing Director & Head of Investments
and Organisation,
Eversource Capital

Gaurav Sood,
Chief Executive Officer,
Sprng Energy

Organisers

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SNAPSHOTS FROM PREVIOUS YEAR



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Two delegates	40,000	7,200	47,200	787
Three delegates	55,000	9,900	64,900	1,082
Four delegates	70,000	12,600	82,600	1,377

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