

10th Edition

A VIRTUAL CONFERENCE

WIND POWER IN INDIA

Sector Outlook and the Way Forward

October 26, 2020



3rd Edition

A VIRTUAL CONFERENCE

BIOMASS POWER IN INDIA

Trends, Challenges and Outlook

October 27, 2020

Organisers:

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WIND POWER IN INDIA

Mission

- India's wind power market is evolving fast amid the chaos and confusion created by the ongoing pandemic.
- The short-term impact of the pandemic has been a slowdown in wind power capacity additions. Wind power installations in the first half of 2020 stood at a mere 324 MW, a significant decline from 1.2 GW capacity in the first half of 2019. This can be largely attributed to lockdown measures, transport restrictions and supply chain disruptions brought upon by Covid, as well as transmission-related hurdles.
- From a medium- to long-term perspective, however, there have been several positive outcomes. The latest round-the-clock (RTC) and hybrid renewable energy tenders received a substantial response. Wind power plays a vital role in such projects due to its generation profile.
- The ongoing localisation drive, which has led to an increase in project and equipment prices across many sectors, has had a minimal impact on wind power project costs. The wind supply chain is already localised in India to an extent of 80-85 per cent by value, and major components being imported are limited to castings and power electronics.
- Further, the wind supply chain is gearing up to increase its competitiveness in India. Wind OEMs like Siemens Gamesa, Nordex, Inox and Suzlon have already announced or launched over 3 MW of platforms for the country. The increasing competitiveness of wind can unlock a larger pipeline and reinvigorate the interest of developers and offtakers in the industry.
- There have been encouraging developments on the policy and regulatory front as well. The MNRE granted a must-run status to all renewable energy projects to ensure offtake. States like Andhra Pradesh and Tamil Nadu have recently issued policies to incentivise the development of wind energy projects and export the excess power to other states.
- A key emerging trend in the space is that IPPs are moving towards a self-sufficient operations and maintenance strategy in order to maximise efficiency and reduce costs. Digitalisation has emerged as a key part of this strategy as it enables remote monitoring.
- **The mission of this one-day virtual event is to study the impact of Covid on wind market dynamics, examine the new opportunities, assess the impact of recent policy and regulatory initiatives, discuss the risks and challenges, and showcase the latest innovations, most promising technologies and noteworthy projects.**

Target Audience

- The conference is targeted at officials and managers from:
 - Power producers (gencos)
 - Power distributors (discoms)
 - Power transmission companies (transcos)
 - IPPs and Wind farm developers
 - Wind turbine manufacturers
 - Capital and maintenance dredging firms
 - Equipment manufacturers
 - Technology providers
 - Operations and maintenance companies
 - Renewable energy development agencies
 - Carbon fund investors and managers
 - Energy storage and system integration experts
 - Design and engineering organisations
 - Financial institutions and other investors
 - Insurance companies
 - Legal and consulting firms
 - Research and certification agencies
 - Regulatory and other government agencies, etc.

Previous participants

The participating organisations in our previous conferences on "Wind Power in India" include ABB, ABPS Infrastructure, Aditya Birla Management Corporation, AFMercados EMI, Alar Group, Acciona Wind, Akvo Energy, Alfa Infraprop, Alfanar Energy, Altra Industrial Motion, APSPDCL, APTRANSCO, Andhra Pradesh Central Power Distribution, AVVNL, Axis Bank, Baumer, BASF, Bahwan Cybertek, Bank of Baroda, BASF India, BHEL, Bonfiglioli Transmission, Bridge To India Energy, Brokings India, CERC, CESC, Centre for Wind Energy Technology, CPRI, Chennai Petroleum Corporation, CLP Wind Farms, Continuum Wind Energy, Croda, Customized Energy Solutions, DHI, Diab Core Materials, Embassy of Norway, Embassy of Spain, Engie, Foundation For MSME Clusters (FMC), Freyssinet Menard, Fugro, Fortum, GAIL, GE India Industrial (Renewable Energy), Genpact, GERB Vibration Control Systems, GERC, Grasim Industries, Greenko Group, GETCO, GSECL, Greenko, GSEC, Gurit, Hero Future Energies, Hindustan Petroleum Corporation, ICOFP, ICRA, IESA, IL&FS Wind Power Services, IIFCL, IEX, IREDA, Indian Wind Turbine Manufacturers Association, International Seaport Dredging, Jan De Nul Group, JK Cement, JVVNL, K P Energy, Karam Chand Thapar & Bros., KPMG Advisory Services, Kshema Power and Infrastructure Company, LAP Laser Applications, Lara Global, Larsen & Toubro, LM Wind Power Technologies, M&I Materials India, Maharashtra Energy Development Agency, Marsh India Insurance Brokers, Ministry of New and Renewable Energy, NAIIR, National Institute of Wind Energy, Neev Fund, NIWE, Nomura, NMDC, NPTI, NSPCL, NTPC, ONGC, Orange Renewable, Owens-Corning, Piramal Capital, POSOCO, Powerica, Profec Ventus, Prudent Insurance Brokers, PTC India Financial Services, ReNew Power, Rosenberger Electronics, Rothe Erde India Private (Thyssenkrupp), SAGTA, Sany Renewable Energy Investment, SANY Wind Energy India, SB Energy, SBI Capital Markets, Schunk Metal & Carbon, Sembcorp Green Infra, Servion India, Septett Advisory Services, Shanthy Gears, Siemens Gamesa Renewable Power, SIKA India, Sitac Management & Development, SKF India, SJVNL, SMEC, SKF, SITAC, Solar Energy Corporation of India, Sprng Energy, Sterlite Power Transmission, Sudheer Infrastructure, Suzlon, Swati Energy, Swan Energy, Surya Vidyut, Suyog Urja, Suzlon Energy, Tamil Nadu Electricity Transmission Corporation, Tata Power, TEDA, THDC India, TERI, THDC, TNERC, Toyota Kirloskar Motors, Trimble Solution, UL, Unison Insurance, UshdeV International, Van Oord, Vestas, Vish Wind Infrastructure, WAPCOS, Wartsila, Wind World, Yes Bank, etc.

AGENDA/STRUCTURE

SECTOR TRENDS: NEW DEVELOPMENTS AND REVISED OUTLOOK

This session will feature a presentation by a leading consultant

- ❖ How has wind power fared in the energy mix? What are the key drivers, risks and hurdles?
- ❖ In what ways has the Covid-19 outbreak changed the investor perception in favour of wind power?
- ❖ What is the revised policy and regulatory outlook? What is the way forward?

MNRE'S PERSPECTIVE: ENABLING PROJECT SUPPLY AND DEVELOPMENT

This session will feature remarks by a senior representative from the MNRE

- ❖ What have been the MNRE's key initiatives to scale up the development of wind power projects?
- ❖ 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?

SECI'S TENDERING STRATEGY AND DIRECTION

This session will feature remarks by a senior representative from SECI

- ❖ What are SECI's plans for meeting timelines under its wind tendering trajectory?
- ❖ Is SECI planning to launch more 24x7 tenders? What are the key challenges in such projects?
- ❖ How has the wind capacity addition outlook up to 2022 changed?

INDUSTRY CONCLAVE: KEY LESSONS FROM COVID-19 CRISIS

This session will feature a panel discussion among senior representatives from wind IPPs and OEMs

- ❖ What is the developer outlook for the solar sector post Covid-19? What are the key concerns and investment plans?
- ❖ What is the OEMs' perspective on building the domestic supply chain? What are the key hurdles?
- ❖ What are the industry's expectations from the government and other stakeholders?

STATE FOCUS

This session will feature a panel discussion as well as presentations by senior representatives from state renewable energy departments and nodal agencies

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

STATE OF DISCOM FINANCES: IMPACT ON PPA CREDIBILITY & POWER OFFTAKE

This session will feature a presentation by a leading consultant

- ❖ What is the status of discom financing with respect to profitability, AT&C losses, outstandings, etc.?
- ❖ Which states have been the most impacted? What are the projections for the next fiscal?
- ❖ What is the impact of their finances on PPA credibility and power offtake?

INVESTOR AND LENDER PERSPECTIVE

This session will feature a panel discussion among senior representatives of leading funds, banks and other financial institutions with exposure/interest in the solar sector

- ❖ What is the lender and investor stance on the wind power sector, especially post Covid-19?
- ❖ What are the biggest issues or sore points (land and grid constraints, PPA sanctity, offtaker risks, etc.)
- ❖ What is the future outlook?

SPOTLIGHT

This session will feature presentations and discussions among leading subject matter experts from the industry as well as government departments

OFFSHORE WIND: WHEN WILL IT BECOME VIABLE?

- ❖ What have been the growth trends across the world? What is the current status in India?
- ❖ How has the cost economics evolved? What are the major policy and regulatory gaps in India?
- ❖ What is the medium- and long-term outlook? What factors would make it viable for India?

RENEWABLE ENERGY HYBRIDS AND ENERGY STORAGE

- ❖ What has been the experience of solar-wind hybrids in India? What is the cost economics?
- ❖ What is the role of energy storage? What has been the progress in this space so far?
- ❖ What is the project-level experience? What are the key challenges? What is the future outlook?

DIGITALISATION AND REMOTE MONITORING: FOCUS ON F&S AND DSM

- ❖ What have been the key initiatives in terms of remote management of operations and maintenance?
- ❖ What are the emerging digital solutions for forecasting and scheduling implementation?
- ❖ What is the cost-benefit analysis of going digital?

BIOMASS POWER IN INDIA

Mission

- In a significant development, India surpassed the target of achieving 10 GW of biopower-based installed capacity in early 2020, two years before the planned timeline. The current installed biopower generation capacity, including bagasse- and non-bagasse-based cogeneration/captive power and waste-to-energy (WtE) projects, stands at over 10,100 MW.
- The main driver of this growth has been biomass cogeneration. In comparison, the WtE segment has been slow to pick up, but holds considerable potential in the country given the quantum of waste generation.
- The Ministry of New and Renewable Energy (MNRE) has introduced various programmes for promoting the bioenergy segment in India. It provides central financial assistance under these programmes for project development, programme implementation, information dissemination and trainings. These include the New National Biogas and Organic Manure Programme, the Biomass Power and Bagasse Cogeneration Programme, and the Biomass Gasification Programme. The Biogas-based Power Generation (off-grid) and Thermal Energy Application Programme (BPGTP) is also being implemented for 3-250 kW capacity plants.
- In early 2020, the MNRE revised the guidelines for its WtE programme. A new addition to the guidelines was the inclusion of municipal solid waste-based projects based on the clarification by the Department of Expenditure. The objective of the programme is to set up projects based on biogas or bio-CNG, urban, industrial and agricultural waste, captive power, and thermal gasification in industries. It also promotes the setting up of projects for the recovery of energy from municipal solid waste, which can be fed into the grid and used for meeting the captive power, thermal and vehicular fuel requirements.
- Bioenergy offers over 200 GW of largely untapped power potential, but the segment has been growing at a slow pace. A key issue is the absence of an organised market for biomass. Due to the lack of fuel supply agreements/linkages, companies cannot accurately forecast fuel price movements. Moreover, fuel costs have nearly doubled in the past couple of years, but the feed-in tariffs have not been revised accordingly.
- In order to promote growth in the segment, a variety of measures are needed. Scalable business models (such as biomass-based microgrids, round-the-clock renewable energy and energy storage-based biomass) and enabling policy frameworks can provide the much needed boost to the segment and help address the country's growing waste disposal problem.
- **The mission of this conference is to highlight the opportunities, challenges and risks in the biomass segment, and examine the solutions and strategies. It will also provide a platform for sharing experiences and deliberating on the policy and regulatory support needed to promote biomass-based power development.**

Target Audience

- The conference is targeted at officials and managers from:
 - Biomass project developers
 - Biomass equipment manufacturers
 - Supply chain management organisations
 - Regulatory and other government agencies
 - State electricity development agencies
 - Testing and certification agencies
 - Research institution and organisations
 - Financial institutions and investors
 - Project advisory firms
 - Carbon fund managers
 - EPC contractors
 - Off-grid players
 - Technology providers
 - Discoms and gencos
 - Captive power users

AGENDA/STRUCTURE

KEY TRENDS AND OUTLOOK

- ❖ What are the key trends in the biomass-based energy generation segment?
- ❖ What are the key challenges? What are the emerging business models?
- ❖ What role could biomass power play in the future energy mix? What is the market outlook?

KEY PLAYERS' PERSPECTIVE: EMERGING BUSINESS MODELS AND STRATEGIES

- ❖ What has been the experience of key players in terms of investment and operations? What are their future plans?
- ❖ What strategies and business models are developers adopting to address their challenges?
- ❖ What are the suggestions to the government/regulators for expediting growth?

POLICY AND REGULATORY PERSPECTIVE

- ❖ What are the existing biomass policies and programmes?
- ❖ What key initiatives are being taken by the central and state regulators to promote biomass-based power development?
- ❖ Which states are leading the way in terms of policy and regulatory support?
- ❖ What are the upcoming initiatives and programmes? What are the opportunities for private developers?

TARIFFS AND COST ECONOMICS

- ❖ What have been the tariff trends? How does it compare to alternatives?
- ❖ What are the key factors impacting the financial viability of biomass projects?
- ❖ What are the financing risks for biomass projects? How can these be mitigated?

BIOMASS-BASED MICROGRIDS

- ❖ What has been the microgrid operators' experience so far?
- ❖ What is the tariff determination process for these projects? How do tariffs vary across regions?
- ❖ What are the key issues and challenges?
- ❖ What is the current policy and regulatory framework for this sub-segment?

TECHNOLOGY SHOWCASE

- ❖ What are the various technology options for biomass-based power generation?
- ❖ Which technologies are the most promising and relevant in the Indian context?
- ❖ What are the pros and cons of these technologies?

PROJECT SHOWCASE

- ❖ What are some of the noteworthy projects?
- ❖ What are the key project features (size, location, cost, financing, design, technology, etc.)
- ❖ What has been the experience? What are the lessons learnt?

Previous participants

ACC Cement, Air Liquide, APTransco, Aries Power Systems, Bermaco Energy Systems, Chanderpur Works, Cheema Boilers, Clark Energy, Development Environergy Services, Enerzea Power Solution, First Energy, Forbes Vyncke, Fortum India, Green Infra, Greenko, HESCOM, Hindalco, ICICI Bank, IEX, Indian Biomass Power Association, Indian Energy Exchange, Intelligent Energy, IREDA, Kalpataru Power, Kochhar & Co., KRBL, Malpura Biopower, MERC, Ministry of New and Renewable Energy, NVVN, Oil India, Orient Green Power, P J Mehta & Associates, Panera Biotech, POSOCO, Praxair, Precision Engineering, PTC India, Punjab Energy Development Agency (PEDA), ReNew Power, Sinewave Power, SREI Infrastructure Finance, Star Wire (India) Vidyut, Usher Agro, Vermeer, etc.

What differentiates our conferences?

- The **agenda** is developed by our researchers, who track the sector round the year. It is thus **relevant** and **topical**. It is not driven by a particular organisation and does not have a particular slant.
- The **speakers** are **professionals** and **experts** involved in the sector, not a mix of ambassadors, ministers, celebrities and business owners.
- The conferences do not just comprise panels and speeches; they provide a good mix of **expert presentations** and **case histories**, and of course **panel discussions**.
- We have **representation** from **across the country**, as is the case at our physical conferences too.
- Each **stakeholder group** – **policymakers, developers, financiers, consultants** and **relevant NGOs** – is represented at our conferences.
- The moderators merely ask the questions. The **stars** are the **speakers** themselves.
- The **sessions begin and end on time**.
- There is adequate time for a **Q&A session** with **each speaker**. These are not “hit and run” speeches.
- The **delegates** are **professionals** who are vested in the sector, and are not just assembled through social media.
- A **recap** of the conference is also made available to reinforce the key takeaways.

Delegate benefits (Virtual Conference)

- Direct interaction with senior speakers (Q&A facility)
- Easy connectivity to geographically dispersed delegates (click of a mouse)
- Cost effective (lower ticket price as compared to a physical conference)
- Offers flexibility and convenience
- Access to conference recording
- Recap of conference sessions
- Contributes to sustainability and lower carbon footprint

Benefits of sponsorship (Virtual Conference)

- E-Meet influencers and decision-makers/
- Reach out to and engage with new or active prospects
- Generate high quality sales leads
- Increase brand recognition
- Target a captive and engaged audience
- Drive website traffic through social media promotions
- Position your company as the thought-leader in your industry

REGISTRATION FORM

- I would like to register for the “WIND POWER IN INDIA” conference (October 26, 2020)
- I would like to register for the “BIOMASS POWER IN INDIA” conference (October 27, 2020)
- I would like to register for **both the conferences**

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are available

Registration Fee

Both conferences

	INR	GST@18%	Total INR	Total USD
1 Login	9,000	1,620	10,620	150
2 - 3 Logins	15,000	2,700	17,700	250
4 - 5 Logins	21,000	3,780	24,780	350
6 - 9 Logins	27,000	4,860	31,860	450
10 - 20 Logins	33,000	5,940	38,940	550

Any one conference

	INR	GST@18%	Total INR	Total USD
1 Login	6,000	1,080	7,080	100
2 - 3 Logins	10,000	1,800	11,800	170
4 - 5 Logins	14,000	2,520	16,520	240
6 - 9 Logins	18,000	3,240	21,240	300
10 - 20 Logins	22,000	5,400	25,960	370

- There is a 25 per cent discount before October 6, 2020
- GST @18 per cent is applicable on the registration fee.
- Registration will be confirmed on receipt of the payment.

Payment Policy:

- Full payment must be received prior to the conference.
- Payments for “early bird” registrations should come in before the last date of discount. Discount offers cannot be combined with any other offer.
- Conference fees cannot be substituted for any other product or service being extended by India Infrastructure Publishing Pvt. Ltd.

Organisers

The conference is being organised by **India Infrastructure Publishing**, the leading provider of information on the infrastructure sectors through magazines, newsletters, reports and conferences. The company publishes **Power Line** (India’s premier power magazine) and **Renewable Watch** (covers the entire spectrum of renewable energy), **Power News** (a weekly newsletter), and series of research reports on **Wind-Solar Hybrid**, **Competitive Bidding for Wind Projects**, **Waste to Energy**, and **Industrial Solar Market in India**. It also publishes the **Wind Power Directory** and **Yearbook**.

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