New Research Report

POWER DISTRIBUTION IN INDIA 2021

Sector Analysis, Discom Performance, Market Opportunities and Projections

- Research Report
- Data-set (Excel)

The report will provide you with:

- Evaluate the growth performance of the power distribution segment
- Learn about the recent policy and regulatory initiatives and their impact
- Gauge the financial impact of Covid on Discoms
- Get an update on ongoing Government Programmes and Initiatives
- Compare the performance of state discoms on key operational and financial parameters
- Get insights on network development, investment, costs and equipment demand projections
- Evaluate the market opportunities for private players, contractors, equipment providers and investors
- Get access to detailed profiles of state power distribution companies

INDIA INFRASTRUCTURE RESEARCH

High aggregate technical and commercial (AT&C) losses, poor billing and collection efficiencies and delays in tariff hikes have significantly deteriorated the operational and financial performance of the distribution utilities over the years. The latest audited results show that the aggregate losses of discoms have more than doubled in 2018-19 to Rs 449 billion. The gap between ACS and ARR has widened from 22 paise in 2017-18 to 49 paise per unit in 2018-19, while AT&C losses at a pan-India level stood at 23.06 per cent in 2018-19 compared to 22.6 per cent a year ago. The financial stress for discoms has been further aggravated in the last few months with the Covid pandemic. Load reduction from industrial consumers, under recoveries in cash collections and delayed payments have had a significant impact on discom cash flows. The recent Rs 900 billion liquidity package to write off these dues has, however, brought in some relief. Meanwhile, the government has recently announced plans to privatise discoms in union territories (UT) as part of the economic stimulus package reform measures. Besides bringing in fresh capital, efficiency gains, the move is expected to give confidence to larger states to undertake privatisation. Meanwhile, another reform linked distribution scheme is also in the works post UDAY, wherein funding would be linked to reforms and will incentivise states to involve the private sector for improving the efficiency of state discoms. These developments are also aligned with the fundamental reforms such as the Electricity Amendment Bill, revision to the Tariff Policy planned to be implemented to restore sector's creditworthiness.

- ❖ Recent Developments Impacting Tariffs
- ❖ Category-wise Tariff Trends (Agricultural, Domestic, Industrial HT & LT, Commercial)
- ❖ Tariff Revisions
- ❖ Trends in Cross-subsidy Surcharges

25. Power Purchase Costs (2015-16 to 2019-20)
    - ❖ Year-wise Trends in Power Purchase Costs (aggregate and per unit)
    - ❖ Trends in Utility-wise Power Purchase Costs (aggregate and per unit)
    - ❖ Impact of Recent Developments on Power Purchase Costs
    - ❖ Source-wise Power Purchase Costs Trends
    - ❖ Long-term Power Procurement Trends
    - ❖ Short-term Power Trading Trends

26. Capital Expenditure (2015-16 to 2019-20)
    - ❖ Trends in Year-wise Capex
    - ❖ Discom-wise Capex Trends
    - ❖ Key Capex Components
    - ❖ Planned Capex and Proposed Break-up
    - ❖ Capex Break-up of Major Discoms

SECTION VI: DISCOM PROFILES

27. Profiles of Discoms, Integrated Utilities and Power Departments
    - ❖ Andhra Pradesh (APSPDCL, APEPDCL)
    - ❖ Assam (APDCL)
    - ❖ Bihar (NBPDCL, SBPDCL)
    - ❖ Chhattisgarh (CSPDCL)
    - ❖ Delhi (BRPL, BYPL, TPDDL)
    - ❖ Gujarat (PGVCL, UGVCL, MGVCL, DGVCL, Torrent Power)
    - ❖ Goa (Goa PD)
    - ❖ Haryana (UHBVN, DHBVN)
    - ❖ Himachal Pradesh (HPSEB Limited)
    - ❖ Jammu & Kashmir (JKPDD)
    - ❖ Jharkhand (JBVNL)
    - ❖ Karnataka (BESCOM, HESCOM, GESCOM, CESCOM, MESCOM)
    - ❖ Kerala (KSEB Limited)
    - ❖ Madhya Pradesh (MP Paschim, MP Poorv, MP Madhya)
    - ❖ Maharashtra (MSEDCL, Adani Electricity, Tata Power, BEST)
    - ❖ Manipur (MSPDCL)
    - ❖ Meghalaya (MePDCL)
    - ❖ Odisha (CESU, WESCO, NESCO, SOUTHCO)
    - ❖ Punjab (PSPCL)
    - ❖ Rajasthan (JVVNL, AVVNL, JdVVNL)
    - ❖ Sikkim (Sikkim PD)
    - ❖ Tamil Nadu (TANGEDCO)
    - ❖ Telangana (TSNPDCL, TSSPDCL)
    - ❖ Tripura (TSECL)
    - ❖ Uttarakhand (UPCL)
    - ❖ Uttar Pradesh (DVVNL, PVNNL, PuVVNL, MVVNL, KESCo, NPCL)
    - ❖ West Bengal (WBSEDCL, CESC, India Power)
    - ❖ UT Power Departments (Chandigarh, Puducherry, Daman & Diu, Dadra & Nagar Haveli, Andaman and Nicobar Islands)

Each Profile would cover the following:

- ❖ Area of Operations
- ❖ Total number of Customers
- ❖ Line Length Additions
- ❖ Transformer and Substation Capacity
- ❖ Metering Coverage
- ❖ System Reliability Performance (SAIFI, SAIDI)
- ❖ Energy Sales (HT and LT)
- ❖ AT&C losses
- ❖ Billing and Collection Efficiency
- ❖ Revenue Gap
- ❖ O&M Costs
- ❖ Power Purchase Costs
- ❖ Capex
- ❖ Net Profits
- ❖ Future Network Additions and Investments
- ❖ Contact Details

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Contact details:

Sumita Kanjilal

Information Products

India Infrastructure Publishing Pvt. Ltd.,

B-17, Qutab Institutional Area, New Delhi - 110 016, India

Mobile: **+91-9958299609**

Email: sumita.kanjilal@indiainfrastructure.com

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