

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

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.

1. Executive Summary

SECTION I: SEGMENT ANALYSIS, KEY DEVELOPMENTS AND COVID-19 IMPACT

2. Sector Size and Growth

- ❖ Trends in Power Demand
- ❖ Growth in Distribution Line Network
- ❖ Growth in Distribution Transformer Capacity
- ❖ Trends in Substation Additions
- ❖ Energy Sales Trends
- ❖ Growth in Number of Consumers
- ❖ Trend in AT&C Losses
- ❖ Metering Coverage
- ❖ Key Issues and Concerns
- ❖ The Way Forward

3. Key Policy and Regulatory Developments

- ❖ Updates on UT privatisation process
- ❖ Discom Liquidity Package
- ❖ Draft SBDs for Discom Privatisation
- ❖ Draft EA Amendment Bill 2020
- ❖ New Tariff Policy
- ❖ Draft Electricity Rights of Consumers Rules 2020
- ❖ Covid Relief Measures by MoP & CERC
- ❖ Draft LPS Rules 2020
- ❖ DBT proposal for Power Subsidies
- ❖ Others

4. Other Recent Developments

- ❖ Key Developments under Government Schemes
- ❖ Updates under SMNP

- ❖ Odisha Discoms Sale update
- ❖ Reduction in LPS and Fixed charges waiver
- ❖ PPA-related updates
- ❖ Recent Tariff Hikes
- ❖ Distribution Franchises Updates
- ❖ New Technology Initiatives (Blockchain, Digitalisation, EVs, etc.)

5. Impact of Covid-19 on Discoms

- ❖ Overall Sector Impact
- ❖ Impact of Covid on Discom Demand
- ❖ Impact on Discom Finances and Revenues
- ❖ Discom Bailout Package
- ❖ Other Policy and Regulatory Relief Measures
- ❖ Mitigation Measures by Discoms
- ❖ Post Covid Recovery & Strategies

6. Inter-Discom Comparison (2015-16 to 2019-20)

- ❖ Consumer Base
- ❖ Energy Sales
- ❖ Line Length
- ❖ Transformer Capacity
- ❖ AT&C Losses
- ❖ ACS-ARR Gap
- ❖ Power Purchase Costs
- ❖ Net Profits
- ❖ Metering Coverage
- ❖ Reliability Indexes

7. Future Outlook for Network Growth (till 2025-26)

- ❖ Growth Drivers
- ❖ Projected Line length additions

- ❖ Projected Substation Additions
- ❖ Projected Distribution Transformer Capacity Additions
- ❖ Projected Metering Requirements

- ❖ Stakeholder-wise Opportunities
- ❖ Issues and Concerns
- ❖ Future Outlook

8. Future Outlook for Costs, Tariffs and Finances

- ❖ Projected Power Purchase Costs
- ❖ Tariff Outlook
- ❖ Projected Discom Losses
- ❖ Projected Investments
- ❖ Issues and Concerns

12. Distribution Franchisees

- ❖ Operational/Awarded DFs
- ❖ Performance So far
- ❖ Terminated Franchises
- ❖ Recently Awarded Franchises
- ❖ Upcoming Opportunities
- ❖ Issues and Concerns
- ❖ Stakeholder-wise Opportunities
- ❖ Outlook

9. Projected Equipment Requirements (till 2025-26)

- ❖ Projected Investments in Distribution Network
- ❖ Growth Drivers
- ❖ Projected Equipment Demand
 - Cables
 - Conductors
 - Transformers
 - Switchgear
 - Smart Meters

SECTION III: DISCOM OPERATIONAL AND FINANCIAL PERFORMANCE ANALYSIS

SECTION II: NEW FOCUS AREAS

10. Focus on Discom Privatisation

- ❖ Analysis of SBDs for Privatisation
- ❖ UT Privatisation Plans
- ❖ Privatisation Models
- ❖ State-level Developments
- ❖ Stakeholder-wise Opportunities
- ❖ Recent Tenders Floated
- ❖ Issues and Concerns
- ❖ Outlook

13. Operational Performance (2015-16 to 2019-20)

- ❖ Billing & Collection Efficiency
- ❖ AT&C Losses
- ❖ Outages
- ❖ SAIDI & SAIFI Indices
- ❖ DT Failure Rates
- ❖ Issues and concerns
- ❖ Way Forward

11. 250-million Smart Meters

- ❖ Current Scenario
- ❖ Progress So Far
- ❖ Policy Initiatives
- ❖ Industry Readiness
- ❖ Business Models
- ❖ Recent and Upcoming Smart Meter Tenders

14. Financial Performance (2015-16 to 2019-20)

- ❖ Utility-wise Revenues
- ❖ Utility-wise Goss Profits
- ❖ Utility-wise Net Profits
- ❖ ACS-ARR Gap
- ❖ Outstanding Debt of Discoms
- ❖ Subsidies Booked vs Received
- ❖ Key Ratios

15. Outstanding Discom Dues

- ❖ State-wise Trends
- ❖ Utility-wise Performance in Overdue Payments
- ❖ Genco-wise Analysis
- ❖ Trends in dues to RE Generators

- ❖ Overdue Days
- ❖ Discom Bailout Package Details
- ❖ Issues and Concerns
- ❖ Outlook

SECTION IV: PROGRAMME UPDATES

16. UDAY Review

- ❖ Overview
- ❖ New Reforms -Linked Result Based Scheme for Distribution
- ❖ Aggregate Losses
- ❖ Impact of Covid-19
- ❖ AT&C Losses
- ❖ ACS-ARR Gap
- ❖ Outstanding Dues from PRAAPTI
- ❖ Smart Meter Installations
- ❖ Progress under other Parameters (feeder metering, UJALA, etc.)
- ❖ Issues and Concerns
- ❖ Outlook

17. Integrated Power Development Scheme (IPDS)

- ❖ Scheme Coverage and achievements so far
- ❖ Sanctions and Disbursements
- ❖ Infrastructure Additions under IPDS
- ❖ Smart Meter Installations
- ❖ Update under RAPDRP
- ❖ IT enablement under Phase-II
- ❖ GIS m
- ❖ Digital Initiatives

18. Smart Meter National Programme (SMNP)

- ❖ Overview and Programme Targets
- ❖ State-wise Progress
- ❖ Experience and Learnings so far
- ❖ Tender Updates
- ❖ Recent Developments
- ❖ Issues and Concerns

19. DDUGJY

- ❖ Scheme Coverage
- ❖ Sanctions and Disbursements
- ❖ Physical Progress so far
- ❖ State-wise Progress of Sanctioned Projects

20. National Smart Grid Mission

- ❖ MoP-sanctioned Pilot projects
- ❖ Key Learnings from Pilots
- ❖ Status of NSGM-approved Projects
- ❖ Notable SG initiatives by Discoms
- ❖ Issues and Concerns

SECTION V: TRENDS IN POWER PROCUREMENT, COST, TARIFFS AND EXPENDITURE

21. Trends in Discom Power Procurement

- ❖ Trends in Long-term PPAs
- ❖ Pilot scheme for power procurement
- ❖ Exchange-based Power Procurement - DAM and TAM
- ❖ New Power Exchange Segments - RTM and GTAM
- ❖ Issues and Concerns
- ❖ Future Outlook

22. Expenditure Analysis (2015-16 to 2019-20)

- ❖ Year-wise aggregate expenditure trend
- ❖ Utility-wise aggregate expenditure trend
- ❖ Cost Break-up of Utilities
- ❖ Trend in Power Purchase Costs
- ❖ Trend in O&M Costs

23. O&M Costs (2015-16 to 2019-20)

- ❖ Year-wise Trends in O&M Costs
- ❖ Trends in Utility-wise O&M Costs
- ❖ O&M Costs Break-up

24. Tariff Trends (2015-16 to 2019-20)

- ❖ State and Utility-wise Trends in Tariffs

- ❖ 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 (NBPDC, 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, CESCO, 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, PVVNL, 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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