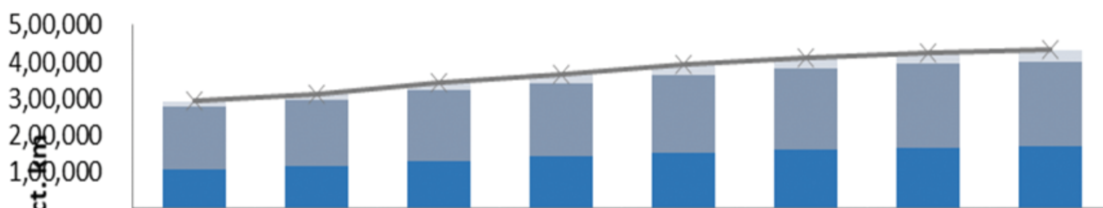
The transmission line length has grown considerably over the years in line to cater to the growth in generation capacity and power demand. As of November 2020, the aggregate transmission line above 220 kV, across all sectors, stood at 433,510 ct. km. The overall line length has increased from 291,336 ct. km in 2013-14 to about 425,000 ct. km in 2019-20, recording a CAGR of 7.5%. The state sector has major share (54%) in the aggregate line length, followed by central (38%) and private sectors (7%). However, in terms of growth rates, private sector (including JVs) leads with a CAGR of over 15% between 2013-14 and 2019-20, vis-à-vis 7.5% for central sector and about 5% for the state sector.

The AC substation capacity stood at 966,000 MVA as of November2020, while HVDC substation capacity stood at 27,000 MW. They have increased at a CAGR of about 10.5% and 11.8% respectively in the last six years. Over three fourths of AC transformer capacity is concentrated at 220 kV and 400 kV levels while the rest is at 220 kV level. In terms of growth, 765 kV transformer capacity has recorded the highest CAGR of over 18.6% between 2013-14 and 2019-20, followed by 400 kV (11.32%) and 220 kV (6.46%).

A pipeline of transmission projects aggregating to over 39,357 ct km of line length and about 120,790 MVA of substation capacity is under development, These projects are likely to be commissioned over the next 4-5 years. To realise the vision of a unified regional grid, new cross border transmission networks are also being implemented/planned with Nepal, Bhutan, Bangladesh and Sri Lanka. As per India Investment Grid, there are over 170 opportunities in the power transmission segment, worth USD 69.65 billion.

Though the pipeline is strong, project completion has been hampered in the past by delays due to challenges in securing right of way, land acquisition, statutory approvals, and contractual disputes. Already the gestation period of renewable projects is just about 18 months vs 36 months for transmission projects, therefore such delays exacerbate renewable developers concerns. Recently, Covid impacted project construction activities, however, work has progressively resumed and transcos could see a delay in project implementation. Further, due to Covid-19, there was an impact on Transco receivables from states. However, overall the transmission segment remained largely unaffected and showed resilience during the Covid-induced lockdown.

Year-wise growth in transmission line length



	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21*
Private/JV sector	13,385	17,641	20,043	24,621	26,928	30,768	31,636	31,872
State sector	1,72,004	1,80,670	1,92,144	2,02,197	2,13,799	2,23,806	2,30,113	2,33,474
Central sector	1,05,947	1,15,126	1,29,364	1,41,033	1,50,243	1,58,833	1,63,322	1,68,164
Total	2,91,336	3,13,437	3,41,551	3,67,851	3,90,970	4,13,407	4,25,071	4,33,510

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