

POWER TRANSMISSION IN INDIA 2022

Sector Progress, Projections and Opportunities

- ❖ Report (PDF)
- ❖ Data-set (Excel)

The Power Transmission in India 2022 report will help you to:

- ❖ Analyse the sector trends, progress, and developments
- ❖ Track the pipeline of upcoming, under-bidding and ongoing projects
- ❖ Learn about the network growth and investment projections
- ❖ Understand the market opportunities for various stakeholders
- ❖ Get access to detailed profiles of 24 STUs and private developers

The country's transmission sector has seen commendable progress in the past few years which has enabled seamless transfer of power across regions to meet the growing demand. Between 2013-14 and 2020-21, the transmission line length grew at a CAGR of over 6 per cent and the AC substation capacity grew at over 10 per cent. Interregional transfer capacity has more than trebled from 33,950 MW in March 2014 to 105,050 in March 2021. The growing integration of renewables will require further augmentation and strengthening of transmission networks in order to evacuate power from upcoming projects. Several new projects at the interstate and intra-state levels expected to come up for tariff-based competitive bidding offering opportunities for both public and private developers, equipment manufacturers as well as EPC players. The National Infrastructure Pipeline has projected a capex of about Rs 3,040 billion for the transmission segment between 2020 and 2025 and state utilities are expected to lead the investment with a capex of Rs 1,900 billion.

Executive Summary

SECTION I: SECTOR ANALYSIS, OPPORTUNITIES AND OUTLOOK

1. Sector Size and Growth

- ❖ Growth in Transmission Line Length (Interstate and Intra-state)
- ❖ Growth in Substation Capacity (Interstate and Intra-state)
- ❖ Trend in Substation Additions (Interstate and Intra-state)
- ❖ Trends in Network Reliability
- ❖ Growth in Interregional Transfer Capacity
- ❖ Capex and Investments

2. Upcoming Project Pipeline

- ❖ Under construction projects
- ❖ Under bidding projects
- ❖ Proposed/Announced projects
- ❖ Market opportunities for
 - Project Developers
 - Investors
 - EPC Contractors
 - Equipment Providers

A detailed database of upcoming projects including line length, substation capacity, voltage, expected cost, expected completion, and current status will be provided in an excel sheet.

3. Network Growth and Investment Outlook (Till 2025-26)

- ❖ Growth drivers
- ❖ Projected Line Length
- ❖ Projected Transformer Capacity
- ❖ Projected Number of Substations
- ❖ Expansion in Inter-regional Transfer Capacity
- ❖ Investment Projections

4. TBCB Experience and Opportunities

- ❖ Private Participation Trends (Interstate and Intrastate)
- ❖ Status of Projects Awarded through TBCB
- ❖ Projects Under Bidding
- ❖ Future Project Pipeline (Interstate and Intrastate)
- ❖ Issues and Concerns

5. Transmission Infrastructure for RE

- ❖ Trends in RE Growth
- ❖ Expected Penetration of Renewables
- ❖ Green Energy Corridors
- ❖ Transmission Scheme for RE Zones
- ❖ Upcoming Projects for RE Evacuation (RTM, TBCB)
- ❖ Reactive Compensation – Targets and Deployment
- ❖ Issues in RE Integration

6. Regional Grid Interconnections

- ❖ Current Cross-border Transmission Links
- ❖ Interconnections under Implementation
- ❖ Planned Transmission Links
- ❖ Issues and challenges

7. Equipment Demand Projections (Till 2025-26)

- ❖ Emerging Technology Trends
- ❖ Projected Equipment Demand
 - Conductors
 - Towers
 - Insulators
 - Transformers
 - Switchgear
 - Reactors

SECTION II: KEY DEVELOPMENTS, POLICY AND REGULATORY LANDSCAPE

8. Key Recent Developments

- ❖ Key Commissioned Projects
- ❖ Projects Awarded in last 12 months
- ❖ Recent M&A Deals
- ❖ Recent Financings and InVits
- ❖ Asset Monetisation Pipeline
- ❖ One Sun, One World, One Grid Initiative
- ❖ Cross Border Trading on Exchanges
- ❖ New Technology Initiatives (including BESS)

9. Policy and Regulatory Initiatives

- ❖ Latest TBCB guidelines and SBDs
- ❖ MoP notice on 33 kV network under transmission
- ❖ MoP Paper on MBED
- ❖ ISTS Charges and Losses Waiver for RE
- ❖ Draft NEP 2021
- ❖ MoP order on TBCB in intra-state projects
- ❖ CTU and Powergrid division and demerger
- ❖ Equipment testing order
- ❖ CERC Procedure in Grant of connectivity to RE projects to ISTS
- ❖ CERC Power Market Regulations 2021
- ❖ CERC Sharing of ISTS Charges and Losses Regulations, 2020
- ❖ Others (MoP Amendments in Charging Infra Guidelines, CEA transformer testing guidelines, etc.)

10. Transmission Tariffs

- ❖ Interstate Transmission Tariffs
- ❖ Intra-state Transmission Tariffs (Long-term and STOA)
- ❖ SLDC Charges

SECTION III: STATE TRANSCO PERFORMANCE ANALYSIS**11. Network Size and Operational Performance**

- ❖ Transmission Line Length
- ❖ Substation Capacity
- ❖ Number of substations
- ❖ Transmission Losses
- ❖ System Availability

12. Financial Performance

- ❖ Revenues
- ❖ Expenditure
- ❖ O&M Costs
- ❖ Net Profit/Loss
- ❖ Capex

13. Future Targets and Capex Plans

- ❖ Network Addition Plans
 - Transmission Line Length
 - Substation Capacity
- ❖ Planned Capex of Utilities

SECTION IV: KEY PLAYER PROFILES**14. Central Sector Players**

- ❖ Power Grid Corporation of India and PGINVT
- ❖ Damodar Valley Corporation
- ❖ Bhakra Beas Management Board

15. State Transmission Utilities

- ❖ Gujarat Energy Transmission Corporation Limited
- ❖ Maharashtra State Electricity Transmission Company Limited
- ❖ Karnataka Power Transmission Corporation Limited
- ❖ Rajasthan Rajya Vidyut Prasaran Nigam Limited
- ❖ Madhya Pradesh Power Transmission Company Limited
- ❖ Uttar Pradesh Power Transmission Corporation Limited
- ❖ Tamil Nadu Transmission Corporation Limited
- ❖ Transmission Corporation of Andhra Pradesh Limited
- ❖ Transmission Corporation of Telangana Limited
- ❖ Haryana Vidyut Prasaran Nigam Limited
- ❖ Odisha Power Transmission Corporation Limited
- ❖ West Bengal State Electricity Transmission Company Limited
- ❖ Punjab State Transmission Corporation Limited
- ❖ Chhattisgarh State Power Transmission Company Limited
- ❖ Kerala State Electricity Board Limited
- ❖ Bihar State Power Transmission Company Limited
- ❖ Assam Electricity Grid Corporation Limited
- ❖ Himachal Pradesh Power Transmission Corporation Limited
- ❖ Jharkhand UrjaSancharan Nigam Limited
- ❖ Jammu and Kashmir Power Development Department
- ❖ Power Transmission Corporation of Uttarakhand Limited
- ❖ Meghalaya Power Transmission Corporation Limited
- ❖ Delhi Transco Limited
- ❖ Tripura State Electricity Corporation Limited

16. Private Network Developers and Operators

- ❖ Adani Transmission Limited
- ❖ Sterlite Power Transmission Limited
- ❖ Indigrd InVIT
- ❖ CLP India
- ❖ Sekura Energy
- ❖ EsselInfraprojects
- ❖ Essar Power Transmission
- ❖ L&T Infrastructure Development Projects
- ❖ Techno-Electric & Engineering Company
- ❖ Others

Each key player profile will include data and information on:

- ❖ Growth in transmission network
- ❖ Operational performance
- ❖ Financial performance
- ❖ Future plans
- ❖ Contact details of 2-3 Key Personnel

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