11th Annual Conference on

SOLAR POWER In India

Bigger Tenders, Fluctuating Tariffs, Emerging Policies and Innovative Financing

June 26-27, 2018, Shangri-La’s The Eros, New Delhi

Organisers:

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Mission

- The year 2018 has begun on a high note for the solar power sector, which achieved an installed capacity of 20 GW in January 2018. The milestone has been achieved four years ahead of the original timeline of 2022 under the National Solar Mission.
- The revised target for installed solar capacity stands at 100 GW, and the sector is fast progressing towards it, as evident in the tendering activity, which is at an all-time high. The month of January alone witnessed tenders for over 5.5 GW being launched by the Solar Energy Corporation of India (SECI) and other state-level agencies. The sudden surge in tenders is in line with the ambitious tender trajectory issued by the Ministry of New and Renewable energy (MNRE) in November 2017. This sends positive signals for the industry, which went through a lull during most of 2017.
- Further, in 2017, for the first time, solar became the main source of new power capacity addition, with utility-scale solar installations reaching 9.6 GW, accounting for 45 per cent of the total power capacity addition in the country.
- The rooftop solar segment is also witnessing steady growth, driven by the uptake of rooftop solar plants in the commercial and industrial sectors. The total rooftop solar capacity is estimated to have reached 1.6 GW in January 2018.
- The growth, in both utility and rooftop solar segments, can be attributed to a major policy push by the government, favourable global market conditions, successful implementation of the solar parks model, positive investor sentiment and innovative financing mechanisms, and technology improvements.
- However, the good news is accompanied by certain developments that may have repercussions on future growth. The recent increase in customs duty due to an additional 10 per cent surcharge will escalate the cost of solar projects, thereby increasing tariffs. Already, the price discovered in the solar auction in Karnataka in February 2018 has gone up to Rs 2.97 per unit, much higher than the winning tariff of Rs 2.44 per unit in the latest auction in Rajasthan.
- The impending decision on anti-dumping duties and the Directorate General of Safeguards' proposal to impose 70 per cent duty on imported solar cells and modules has also led to major unrest among project developers.
- Several other challenges continue to plague the sector. The key amongst these are power offtake and payment security, which are considered the biggest risks in scaling up of solar power given the poor financial health of discoms. Further, there is a lack of integrated generation and transmission planning to support solar power projects. Besides, intermittent solar generation makes grid integration a challenge. Apart from this, the 100 GW solar target calls for a huge investment, which domestic institutions may not be able to meet.
- Policymakers and industry stakeholders are collectively working towards addressing the aforementioned challenges. The implementation of the Green Energy Corridors project, the UDAY scheme, the forecasting, scheduling and deviation settlement mechanism and RPO norms is indicative of the government's efforts to resolve these challenges. The industry, on its part, has devised various innovative financing mechanisms and alternative instruments to lower the cost of capital, and obtain low-cost, long-term commitments from global institutions.
- As solar transitions from being a niche to a disruptive resource, the mission of this conference is to examine the new trends and opportunities in the sector, study the impact of recent policy and regulatory initiatives, discuss the risks and challenges, and showcase the latest innovations, most promising technologies and noteworthy projects. The conference will also provide a platform to project developers, EPC companies and technology providers to share their experiences and exchange ideas.

Target Audience

The conference is targeted at:

- Power developers and operators
- Consultancy organisations
- Financial institutions and investors
- Certifying agencies
- Captive power users
- Utility representatives
- Regulatory agencies
- Technology providers
- Research agencies
- Equipment manufacturers
- Solar power appliance manufacturers
- Government agencies
- Panel manufacturers
- Carbon fund investors and managers
- Solar energy service providers
- Energy storage experts
- Rooftop solar developers
- Distribution companies
- HT power consumers
- Etc.
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AGENDA/STRUCTURE

SECTOR OVERVIEW: KEY TRENDS, COST ECONOMICS AND OUTLOOK
- What have been the key trends and developments in the solar power sector?
- What is the capacity pipeline? Which states are taking the lead?
- What are the key risks and challenges? What is the future outlook?

MNRE’s PERSPECTIVE: KEY STEPS AND POLICY OUTLOOK
- What have been the MNRE’s key initiatives to scale up solar power?
- 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 ROLE: MEETING THE AMBITIOUS TENDERING TRAJECTORY
- What are the emerging tariff and participation trends across tenders?
- What is the plan of action to meet the new tendering trajectory?
- What has been the response for rooftop tenders? What are the future plans?

STATE FOCUS
- What are the existing state policies and programmes? What is the outlook?
- What has been the experience in ongoing programmes?
- What are the emerging opportunities for private developers?

DEVELOPERS’ PERSPECTIVE
- What is the developers’ outlook for the Indian solar market? What are the key concerns?
- What are their investment plans and strategies to meet future demand?
- What are their expectations from the government and other stakeholders?

ROOFTOP SOLAR: EMERGING TRENDS AND OPPORTUNITIES
- Which segments are leading in terms of rooftop uptake?
- Is there adequate policy impetus to maintain the growth momentum, or is an extra push needed?
- What steps need to be taken to attract more customers, particularly residential?

EMERGING DUTY STRUCTURE: IMPACT OF ANTI-DUMPING AND SAFEGUARD DUTIES
- What is the rationale for imposing anti-dumping and safeguard duties?
- How will the imposition of these duties impact the manufacturing industry?
- What are the alternative mechanisms to promote domestic manufacturing?

THE NEW SOLAR DEAL: BEYOND TRADITIONAL FINANCING
- What is the financiers’ perspective on the sector? What are their concerns?
- What are the emerging financing structures for rooftop and utility-scale plants?
- What are the future financing needs of the sector and how can these be met?

SOLAR PLUS STORAGE
- What are the key cost and technology trends in the power storage space?
- Which storage technologies are best suited for solar power projects?
- What initiatives are being taken to promote storage? What is the outlook?

EQUIPMENT MANUFACTURING: IMPACT OF ANTI-DUMPING AND SAFEGUARD DUTIES
- What is the likely impact of increased custom duties on solar equipment?
- What is the international practice in this regard?
- What can be done to promote domestic manufacturing?

SOLAR INNOVATION FORUM: KEY TRENDS IN THE BOSS SPACE
- What are the cost and technology trends for solar inverters, trackers, mounting structures, etc.?
- What are the emerging efficiency improvement practices in the BoS space?
- What is the outlook for BoS equipment?

DISTRIBUTED SOLAR: BRINGING SCALE, PROFITABILITY AND VALUE
- What is the need to promote distributed solar power in India? What are the key bottlenecks?
- Which companies and business models are successful in this space?
- Is there an emerging business case for distributed solar-plus-storage?

EMERGING OPPORTUNITY I: E-MOBILITY
- What is the potential for e-mobility in India? What are the emerging trends?
- What are the key enablers? How will they drive solar power growth?
- Globally, what has been the impact of growth in uptake of e-mobility on solar power demand?

EMERGING OPPORTUNITY II: SOLAR HYBRIDS
- What has been the experience so far in the solar hybrid space in India?
- What is the emerging policy framework?
- What are the key challenges?

FORECASTING, SCHEDULING AND DEVIATION SETTLEMENT
- What are the key features of deviation settlement mechanism across states?
- What is the current status of implementing forecasting & scheduling norms?
- What are the emerging technologies and solutions to enable these mechanisms? What is the cost impact?

MUST-RUN STATUS AND GRID CHARGES
- What is the likely impact of withdrawing the must-run status of solar projects?
- What is the case for imposing transmission and wheeling charges on solar?
- What is the international practice in this regard?

PV POWER PLANTS: OPERATIONS AND MAINTENANCE PRACTICES
- What are the current O&M practices followed by developers and contractors?
- What are the emerging cost trends?
- How can technical advancements improve the O&M of solar plants?

DISCOM FINANCES: UDAY, TARIFFS AND IMPACT OF BUYING SOLAR
- What has been the discoms’ performance on cost coverage and tariffs?
- What has been the impact of the UDAY scheme on their performance?
- What is the impact of solar power procurement on discom finances?

LEGAL AND INSTITUTIONAL CHALLENGES
- What are the legal issues at different stages of project development?
- What should be the key considerations while signing solar EPC contracts?
- What are the key risks faced by developers in this regard?

PROGRESS IN GREEN ENERGY CORRIDORS
- What is the status of the planned green corridors?
- What are the plans for power evacuation from the proposed solar parks?
- What will be the impact of large-scale renewable integration on the grid?

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SNAPSHOTS FROM PREVIOUS YEAR

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