

SOLAR POWER IN INDIA 2018

Overview and Trends; Outlook and Projections

- ❖ Report (PDF)
- ❖ Data-set (Excel)

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SECTION I: OVERVIEW, TRENDS AND PERFORMANCE ANALYSIS

1. Executive Summary

2. Current Scenario and Recent Developments

- ❖ Current Status
- ❖ Key Growth Trends
- ❖ Growth Drivers
- ❖ Emerging Industry Landscape
- ❖ Annual Capacity Addition Targets
- ❖ Yearly Tender Trajectory
- ❖ Recent Developments
 - Solar-Wind Hybrid Policy
 - Competitive Bidding Guidelines
 - CERC's Grid Connectivity Regulations
 - Market Consolidation
 - IPOs
 - Tariffs Determined in Recent Auctions
- ❖ Key Issues and Concerns

3. State-Wise Analysis

- ❖ Andhra Pradesh
- ❖ Gujarat
- ❖ Haryana
- ❖ Karnataka
- ❖ Maharashtra
- ❖ Madhya Pradesh
- ❖ Punjab
- ❖ Rajasthan
- ❖ Uttar Pradesh
- ❖ Tamil Nadu
- ❖ Telangana

This will include key state profiles covering factors such as capacity addition trends, policy targets, RPO compliance, recent tender results, upcoming capacities, 5-year project performance analysis, state-specific concerns and outlook

4. Tender Pipeline and Analysis

- ❖ SECI's Tenders
 - Solar Projects
 - Solar-wind Hybrids
 - Storage-based Projects
 - EV + Solar Projects
- ❖ NTPC's Tenders
 - Solar Projects
 - Solar-wind Hybrids
 - Storage-based Projects
 - EV + Solar Projects

- ❖ State-level Tenders
 - Solar Projects
 - Solar-wind Hybrids
 - Storage-based Projects
 - EV + Solar Projects
- ❖ Other Tenders

5. Financing and Investment Trends

- ❖ Current Financing Sources
- ❖ Cost Trends
- ❖ Investment Trends
- ❖ Recent Deals (Mergers, Acquisitions, Private Equity, etc.)
- ❖ Emerging Project and Company Valuations
 - Large-scale Project Developers
 - Rooftop Project Developers
- ❖ Emerging Sources of Finance (Municipal Bonds, InVITs, IPOs, etc.)

SECTION II: Segment Analysis

6. Utility-Scale Solar Segment

- ❖ Size and Growth
- ❖ State-wise Capacity Addition Analysis
- ❖ Project Development Models
 - Solar Parks (Key Features)
 - Individual Set-ups
- ❖ Emerging Policy and Regulatory Framework
- ❖ Recent Tender Results
 - SECI
 - NTPC
 - State-level
 - Other PSUs
- ❖ Key Risks and Concerns
- ❖ Future Outlook

7. Rooftop Solar Segment

- ❖ Size and Growth
- ❖ State-wise Capacity Addition Analysis
- ❖ Project Development Models
 - Capex
 - Opex
 - Lease
 - EPC-Financing
- ❖ Emerging Policy and Regulatory Framework
- ❖ State-wise Net Metering Regulations

- ❖ Recent Tender Results
 - SECI
 - NTPC
 - State-level
 - ❖ Other PSUs
 - ❖ Key Risks and Concerns
 - ❖ Future Outlook
- 8. Solar-Wind Hybrids**
- ❖ Market Potential
 - ❖ Key Features of the Solar-wind Hybrids Policy
 - ❖ State-level Developments
 - ❖ Cost Economics of Solar-wind Hybrids
 - ❖ Cost of adding Energy Storage
 - ❖ Case Study of Existing Projects
 - ❖ Key Risks and Concerns
 - ❖ Future Outlook
- 9. Solar Open Access Market**
- ❖ Solar Open Access Potential
 - ❖ Open Access Business Model
 - ❖ Current State-wise Solar Open Access Projects
 - ❖ Policy and Regulatory Framework
 - ❖ State-wise Charges and Waivers
 - ❖ Risks and Concerns
 - ❖ Future Outlook
- SECTION III: RISK MAPPING AND MITIGATION**
- 10. Offtakers' Credibility and Financials**
- ❖ Credit Ratings of Discoms
 - ❖ Progress under UDAY
 - ❖ Payment Guarantee Mechanisms and Defaults
 - SECI
 - NTPC
 - State Discoms
 - ❖ Mitigation Measures
- 11. PPA Terms and Conditions**
- ❖ Tariff Structures
 - ❖ Payment Security
 - ❖ Project Development Timelines
 - ❖ Default and Termination
 - ❖ Termination Compensation
 - ❖ Setting up Power Evacuation Infrastructure
 - ❖ Mitigation Measures
- 12. Solar Grid Integration and Management**
- ❖ Solar Power Integration Needs
 - ❖ Key Grid-related Challenges
 - ❖ Current Status of Green Energy Corridors Status
 - ❖ Mitigation Measures
 - State-wise Forecasting and Scheduling Regulations
 - State-wise Deviation Settlement Mechanism
- SECTION IV: SECTOR OUTLOOK AND PROJECTIONS (SHORT-TERM, MEDIUM-TERM AND LONG-TERM)**
- 13. Capacity Projections (2020, 2025 and 2030)**
- ❖ Total Capacity Requirement Projections
 - ❖ Solar Power Share in Capacity Mix
 - Utility-scale
 - Rooftop Solar
 - ❖ Solar Power Share in Power Generation Mix
 - Utility-scale
 - Rooftop Solar
- 14. Investment and IRR Projections (2020, 2025 and 2030)**
- ❖ Tariff Projections
 - ❖ Cost Projections
 - Cost of Capital
 - Equipment Costs
 - Land Costs
 - Etc.
 - ❖ IRR Projections
 - Utility-scale
 - Rooftop Solar
 - ❖ Investment Projections
 - Utility-scale
 - Rooftop solar
 - ❖ Financing Requirements
 - Equity
 - Debt

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