Catalogue of Research Reports on Infrastructure Sectors

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Our clients include most organisations involved in the infrastructure sectors - multinationals, top Indian corporates, commercial and investment banks, consulting companies, public sector companies, government agencies, multilateral agencies and legal firms.
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EXECUTIVE SUMMARY
With the growing demand for power in urban areas and industries, underground cable systems are becoming an increasingly indispensable part of power transmission and distribution systems. With improved technologies and increased reliability, the cost differential between underground cables and overhead power lines is narrowing and utilities are acknowledging the benefits associated with underground cabling. This report will attempt to take a look at the key trends in the deployment of underground cables so far; analyse the plans and proposal of T&D utilities; examine new and evolving technology improvements and solutions being offered by the industry; as well as assess the key issues and challenges.

1. T&D INDUSTRY OVERVIEW
The T&D industry has been growing steadily with investments being made in system strengthening and capacity additions. This chapter gives an overview of the T&D industry and will focus on:
- Growth and Size of Existing T&D Networks
- Recent T&D Network Additions
- Projected T&D Network Additions
- Projected Capex (till 2022-23)
- Future Outlook
- Issues and Challenges

2. MARKET SIZE AND GROWTH FOR UNDERGROUND CABLES
Most of India’s T&D network continues to be strung overhead across the country; however, concerns about reliability and quality of supply are making utilities gradually replace their networks with underground lines. This chapter gives an overview on the new and emerging utility requirements in the underground cabling segment and will cover the following:
- Experience so far in T&D Networks
- Emerging Utility Requirements
  - Transmission
  - Distribution
- Major Projects Commissioned
- Transmission
- Distribution
- Major Projects Awarded/Under Construction
- Transmission
- Distribution
- Key Recent Tenders
- Issues and Challenges

3. RECENT TRENDS AND ADVANCES
Well-designed and well-installed underground cable systems are expected to have a service life of 30-40 years. Utility providers, transmission companies and cable manufacturers are hence, looking for new technologies and solutions to respond to new grid challenges. This chapter looks at the new and promising technologies, designs and solutions for underground cable networks.
- Design, Laying and Construction Processes
- Product and Technology Trends
- Market Trends and Developments (JVs/Acquisitions/Partnership Deals)
- Pricing and Cost Trends

4. OPPORTUNITIES UNDER KEY CENTRAL/STATE GOVERNMENT PROGRAMMES
Underground cables are an important part of several central government initiatives for improving T&D networks under IPDS. This chapter provides the details of plans and targets of works proposed to be taken up under various schemes.
- Snapshot of Key Government Programmes (IPDS, Green Energy Corridors, State Government Initiatives, etc.)
- Physical Targets for UG Cabling Works
- Funding Availability for UG Cabling Projects
- Issues and Concerns

5. OPPORTUNITIES UNDER SMART CITIES MISSION
The Smart Cities Mission offers significant opportunities for underground cabling in key cities. Some cities such as Indore, Belagavi, Dharamshala, Lucknow, Kanpur and Tirupati are implementing projects for setting up underground cabling network for utilities such as electric wires, water pipelines, stormwater drains, sewers and telecommunication cables. This chapter provides the details of plans and targets of works proposed to be taken up under various schemes.
- Snapshot of the Mission
- Physical Targets for UG Cabling Works
- Projects Completed so Far in Key Cities
- Projects Under Construction/ Awarded
- Proposed Projects
- Issues and concerns

6. OUTLOOK AND PROJECTIONS (till 2022)
This chapter will give a snapshot of the investments and physical targets proposed for underground cabling networks by transcos and discoms. The information presented in this chapter is based on both primary and secondary information collected from transcos and discoms.
- Growth Drivers for UG Cabling
- Expected Demand for UG Cables
- Plans and Targets of Utilities by Segment
  - Transmission
  - Distribution
- Budgeted Capital Expenditures on UG Cabling
- Future Outlook

7. LEADING PLAYERS
This chapter primarily focuses on the profiles of key vendors and technology providers for underground cabling. Each profile covers the following information:
- Brief Company Overview
- Key Product Offerings
- Existing Manufacturing Capacity
- Financial Performance
- Future Plans

The report is available in a PDF format.
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The report is available in a PDF format.
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The franchises covered include:
- Bhiwandi (Torrent Power Limited)
- Nagpur (Spanco Nagpur Discom Limited)
- Agra (Torrent Power Limited)
- Muzaffarpur (Essel Vidyut Vitaran (Muzaffarpur) Limited)
- Bhagalpur (SPML Infra Limited)
- Gaya (India Power Corporation Limited)
- Kendrapara Division I & II, Jagatsinghpur, Dhenkanal, Talcher and Angul (Enzen Global Solutions Private Limited)
- Khurda, Balugaon, Puri and Nayagarh (Feedback Electricity Distribution Company Limited)
- City Electrical Division (Cuttack), Athagarh and Salipur (Riverside Utilities Private Limited)
- Nimapara (Seaside Utilities Private Limited)
- Kota, Bharatpur and Bikaner (CESC Limited)
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   (Each profile includes information on current operational capacity, business models, tenders, future plans, etc.)

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    - Cleantech Solar Energy (India) Private Limited
    - Azure Power Global Limited
    - Amplus Energy Solutions Private Limited
    - RattanIndia Power Limited
    - Tata Power Solar Systems Limited
    - Sure Energy Systems Private Limited
    -Fourth Partner Energy Private Limited
    - Ujaas Energy Limited
    - SunSource Energy Private Limited
    (Each profile covers the details related to their business models, existing and in-pipeline project portfolio, installed capacity, geographical presence, future plans, O&M practices, etc.)

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    (Each profile provides information on market share, product portfolio, projects they have supplied to, future plans, etc.)

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    (This includes details pertaining to winner, tariff, capacity, project location, project size, etc.)

The report is available in a PDF format.
1. MARKET OVERVIEW, KEY TRENDS AND RECENT DEVELOPMENTS

There is a rising popularity among developers, especially renewable energy players, to go for third-party direct sale agreements. States of Karnataka, Tamil Nadu, Andhra Pradesh and Telangana in the southern region of India and Rajasthan, Punjab and Haryana in the northern region of the country are fast catching up with open access transactions. But there are significant challenges in the growth of this segment, especially those pertaining to discoms’ resistance to let go of their high-end consumers.

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3. EXISTING OPEN ACCESS POLICY AND REGULATORY SCENARIO

The policy and regulatory framework in this space is currently highly dispersed and varied across states, and is not even stable over the years. There is always a risk of open access charges changing year on year, making it a risky proposition to invest in.

- Overview of Open Access Charges and Losses: For Solar Projects, For Wind Projects
- Model Regulations for Intra-state Open Access and Group Captive
- State-wise Orders of Open Access/Group Captive
- State-wise Implementation Status Overview
- State-wise Power Demand and Supply Overview
- RPO Trajectory for Open Access Consumers
- Key Issues and Challenges

4. INDUSTRY STRUCTURE AND BUSINESS MODELS

The industry structure in the renewable open access segment has been emerging gradually with more number of players entering into this space. Project developers and investors are currently cautious of investing significantly in this segment, but the trend is now changing.

- Power sale options: Bilateral, Collective, REC
- Industry Structure
- Key Players and Capacities: Solar Segment, Wind Segment
- Risks and Concerns

5. TERMS OF THIRD-PARTY POWER SALE CONTRACTS

It is important for both the buyers and sellers to clarify and list out their expectations and accordingly draw up the commercial power sale contract as per the applicable regulatory framework in the respective state.

- Time Period
- Extension Provision
- Tariff and Escalations

6. ROLE OF ENERGY BANKING, F&S AND DEVIATION SETTLEMENT MECHANISM

Energy banking will play a key role in the success of solar and wind power-based open access projects. Banking is presently allowed by SERCs upon the levy of a banking charge, which differs in magnitude across states. Rules around energy banking are specified in different types of documents in various states. Additionally, various attributes of the energy banking framework also differ across states.

- State-wise Energy Banking Mechanism for Open Access Projects
- Banking Charge, Banking Period, Buy-back Rate, Restrictions on Time of Injection, Withdrawal of the Banked Energy, Other Attributes (seasonality constraints, buy-back rates, accounting for RPO, etc.)
- State-wise Emerging Energy Banking Framework
- State-wise Forecasting and Scheduling
- Deviation Settlement Charges

7. STATE PROFILES

This chapter will include profiles of Andhra Pradesh, Karnataka, Tamil Nadu, Maharashtra, Gujarat, Rajasthan, Madhya Pradesh, Telangana, Uttar Pradesh, Chhattisgarh, Haryana, Delhi, Punjab, etc.

- Key Players and Capacities: Overall Solar, Solar Open Access, Overall Wind, Wind Open Access
- Landed Cost and Return Analysis
- Process and Approvals for Open Access Projects
- Key Industrial and Corporate Clusters: Existing, Upcoming

8. PROJECTED OPEN ACCESS MARKET

Over 2 GW of green power is being sold to big corporates through direct agreements and the trend is northbound as more and more corporates and industries are joining in the race. The business case for renewable energy based open access is getting stronger with the decreasing cost of green power and increasing cost of thermal power.

- Short-term (2019-23) and Long-term (2024-28) Projections
- Renewable-based Open Access Capacity Projections
- Open Access Projected Tariff and Pricing Trends
- IRR Projections
- Future Growth Drivers
- Expected Market Restraints

EXPERT OPINION

The report will feature 5-8 interviews of senior representatives at regulatory commissions, large open access consumers and key open access project developers, and experienced industry consultants

The report will be available in a PDF format.
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4. PROGRAMMES/ INITIATIVES IMPACTING EQUIPMENT MARKET

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(Each profile covers existing and planned manufacturing capacity, product portfolio, recent orders, financial performance, etc.)

The report is available in a PDF format.
1. EXECUTIVE SUMMARY

Solar plants are built to last 20-25 years. After the engineering procurement and construction period is completed, developers need to ensure that the operations and maintenance (O&M) activities are seamless for sustained energy generation over the project lifetime. The report will highlight the emerging opportunities in this space and the growing role of new technologies like automation and artificial intelligence.

2. MARKET OVERVIEW

In the initial years of solar power development in India, O&M was often coupled with EPC and performed by the same vendors, but of late, solar O&M has emerged as a separate market with its own landscape, trends and dynamics. This chapter will cover the following areas:

- Current size of the solar O&M market
- Market size by segment
  - Utility-scale, Rooftop, Canal-top & floating solar
- Key growth trends and drivers
- O&M Evolution - Reactive to Predictive Analysis
- Applications in solar O&M, Cost and time savings
- Emerging Role of Energy Storage
- Key issues and concerns

3. COST TRENDS

The cost of O&M services has been declining over the past few years and the downward trend is expected to continue. The cost composition itself is changing due to greater automation and use of advanced tools. This chapter will cover the following areas:

- Solar O&M cost trajectory (2012-18)
- Cost breakup analysis
  - Vehicles and logistics, Equipment and tools, Overheads, Personnel/Manpower, Digital, Others
- Cost projections (2019-24)
  - Business model evolution, Key cost considerations, Impact of scale, Impact of energy storage, Future cost estimates

4. EMERGING O&M BUSINESS MODELS

Globally, there has been a rise of third party solar O&M service providers. As more sophisticated and structured approach emerges in the solar O&M market, third party providers are able to deliver more value to solar investors and owners. This chapter will cover the following areas:

- Capex-based
- Profit-sharing
- Fixed cost
- O&M extensions
- Others

5. TERMS OF O&M CONTRACTS

It is important for both developers and O&M service providers to clarify and list out their expectations and accordingly draw up a long-term contract. An effective contract will result in higher plant efficiencies. This chapter will cover the following areas:

- Time periods
- Product warranties
- Performance guarantees/SLAs
- Penalties
- Ownership
- Legal terms

6. GRID MANAGEMENT BY O&M PLAYERS

As the government becomes stricter in its implementation of forecasting, scheduling and deviation settlement mechanism regulations, grid management will become a key component of O&M players. Integration of energy storage on to existing plants will lead to a greater O&M play. This chapter will cover the following areas:

- Forecasting and scheduling
- Deviation settlement management
- Integration of energy storage into existing plants
- Cost implications
- Experience so far

7. O&M COMPANY PROFILES

A large number of O&M focused players are coming up, some as hive-offs from existing EPC companies and others as independent specialists. This chapter will have 5-8 profiles of key O&M players in India covering the following:

- Project portfolio
- Service offerings
- Technology tie-ups
- On-ground experience
- In-pipeline capacity
- Etc.

8. DIGITALISATION AND AUTOMATION AT PLANT LEVEL

Digitalisation and automation will play a key role in providing efficient O&M services, thereby changing the current O&M cost composition, which is currently dominated by manpower expenses. New technologies are being adopted for improving asset lifecycle management, predictive maintenance, remote sensing and control, cloud computing, and use of drones for visual imaging. A number of companies have also already started using robotics for cleaning modules. This chapter will cover the following areas:

- Emerging role, applications and use case for the following
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- Growing role of artificial intelligence
- Machine learning applications, AI field assistants and predictive analytics, Existing use cases
- Key technology providers
- Industry Perspective
  - (Views of key personnel from the solar O&M industry and technology providers on the growing role of AI, robotics and data analytics)

9. KEY CHALLENGES, BEST PRACTICES AND CASE STUDIES

The lack of attention given to O&M practices is one of the primary challenges that the segment is facing. If the plant is not maintained properly, developers can lose up to 15 per cent of the returns. This chapter will cover the following areas:

- O&M challenges matrix
- Best practices (Globally and in India)
- Case studies (This will cover successes and failures of various technologies, business models and strategies adopted by O&M players)

10. PROJECTED O&M MARKET SIZE (FROM 2019-20 TO 2024-25)

The total addressable market for solar PV O&M is expected to reach 30 GW in 2018-19. It is likely to more than triple by 2022 to exceed 100 GW. In fact, going forward, as the installed base gets larger, O&M revenue may even exceed the development and construction revenue. This chapter will cover the following areas:

- Impact factors
- Emerging O&M industry structure
- Short-term projections
- Medium-term projections
- Long-term projections

The report is available in a PDF format.
# Industrial and Commercial Grid Power Market in India 2017

**Price:** Rs 40,000 (USD 944)

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The report is available in a PDF format.
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   Each profile would cover the following:
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The report is available in a PDF format.
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Solar Power in India 2017 (May 2017)

Segment Analysis, Trends and Developments

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The report is available in a PDF format.
# Wind Power in India 2017

## August 2017

Sector Analysis, Market Outlook and Opportunities

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The report is available in a PDF format.
Solar Plant Performance in India 2017-18

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## Logistics in India 2018 (July 2018)

Trends, Growth Drivers and Opportunities

**Price:** Rs 75,000 (USD 1,770)

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Each chapter will cover:

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Each profile will cover information on traffic, capacity, financial and efficiency performance, existing infrastructure, ongoing and upcoming projects, and future expansion plans.

The report will be available in a PDF format.

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India Infrastructure Research | 25
Dredging in India (October 2018)

Market Analysis, New Opportunities and Outlook

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A comprehensive database of key dredging projects with information on quantity dredged, contractor, location, contract value, type of dredged deployed, etc. The database would include projects being undertaken at the major ports, non-major ports, national waterways, oil and gas fields, rivers, beaches, etc. It would also cover the ongoing and upcoming projects under the central government programmes.

The report is available in a PDF format.

Price: Rs 60,000 (USD 1,416)
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The industries covered include brick and mortar retail, food processing, chemicals, engineering goods, textiles, electronics, pharmaceutical and automobiles

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The report is available in a PDF format.
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Each profile will provide an overview of the project portfolio (completed, under construction and planned projects), financial performance, recent developments, future plans, strategies, etc.

The report will be available in a PDF format.
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[Each profile covers the project scope (network length, number of stations, rolling stock, fare system, signalling and telecommunication, traction, etc.), implementing agency, project cost, key consultants, key contractors, key milestones, sources of funding, recent contracts, upcoming tenders, current status, etc.]

The report is available in a PDF format.
Clean Bus Market in India: Hybrid, Electric, Gas-Based
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The report is available in a PDF format.
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The report is available in a PDF format.
# Construction in India 2017

## Trends, Outlook and Projections

(March 2017)

**No. of slides:** 334  **Price:** Rs 75,000 (USD 1,770)

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The report is available in a PDF format.
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The report is available in a PDF format.
# Affordable Housing in India 2018

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(Each profile covers information on company overview, project portfolio – completed & ongoing, upcoming projects, financial performance and future plans.)

The report is available in a PDF format.

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Smart Cities in India 2018

Segment Analysis, Outlook and Opportunities

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- Key Focus Areas (Mobility, Water and Waste, Energy, Governance, Safety and Security, Buildings, Communication, etc.)
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# Infrastructure Projects in Pipeline 2017-22

(October 2017)

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Each project provides information on project scope, cost, capacity, location, implementing agency, ownership, EPC contractor/developer, equipment provider (wherever available), current status, date of commencement of construction/month of award (wherever available), and expected date of completion (wherever available).

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- Urban Transport
- Seaports
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- ICT
- Water and Sanitation

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- Size and Growth, Emerging Trends and Recent Developments, Proposed Investments, Upcoming Projects, Market Opportunities, Issues and Challenges, Future Outlook

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(Each chapter includes size and growth, policy and institutional framework,
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The report is available in a PDF format.

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Each state profile covers basic statistics (irrigation potential, surface water, ground water availability etc.), key agencies involved, recently completed projects, ongoing projects, future projects, new initiatives and key achievements.

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Each country profile provides information on:
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   - Aerospace
   - Armoured and Defence Logistics Vehicles
   - Arms and Ammunition
   - Electronics and Communication Systems
   - Shipbuilding

Each of the segments will include the following:
   - Market Size and Growth, Trends in Expenditure, Key Contracts Awarded, Industry Structure and Key Players, Role of DRDO and OFB, Collaborations and Tie-ups, Impact of Make in India on Indegenisation, Modernisation Plans and New Product Launches, Upcoming Contracts, Segment Outlook

Section IV: Key Players

9. Profiles of Defence Public Sector Undertakings (DPSUs)
   - Bharat Dynamics Limited
   - Bharat Electronics Limited
   - Bharat Earth Movers Limited
   - Garden Reach Shipbuilders and Engineers Limited
   - Goa Shipyard Limited
   - Hindustan Aeronautics Limited
   - Hindustan Shipyard Limited
   - Mazagon Dock Shipbuilders Limited
   - Mishra Dhatu Nigam Limited

Each profile will give an overview of the DPSU’s operations, financial performance, indirect imports and vendor development, share in defence procurement, capex plans, indigenisation targets, modernisation initiatives, key collaborations, R&D initiatives, and future plans and strategies.

10. Profiles of Private Players
    - Airbus Group India
    - Ashok Leyland Defence Systems
    - Bharat Dynamics Limited
    - Bharat Earth Movers Limited
    - Garden Reach Shipbuilders and Engineers Limited
    - Goa Shipyard Limited
    - Hindustan Aeronautics Limited
    - Hindustan Shipyard Limited
    - Mazagon Dock Shipbuilders Limited
    - Mishra Dhatu Nigam Limited

Each profile will give an overview of the company’s operations, key contracts, recent collaborations, joint ventures, and future plans and strategies.

The report will be available in a PDF format.
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- **Name (Block Letters)**: 
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<td>Ports &amp; Shipping News</td>
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