

# India Power Report Q2 2016

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## Abstracts

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**BMI View:** Our view that power sector reforms would be a top priority for Modi's government is playing out. We are seeing notable progress in the Indian power market regarding renewable energy expansion, reducing red tape for power projects and improving fuel availability for thermal generation. That said, investment in India's power grid infrastructure will need to increase if Prime Minister Modi's ambitious power plans are to be realised. The transmission and distribution network remains highly inefficient, posing a significant risk to the expansion of the power and renewables sector in India. Reforming power tariffs will therefore be fundamental to ensuring sustainable supply and achieving Modi's power expansion ambitions.

### Latest Updates And Structural Trends

The sizeable coal power project pipeline and the widespread availability of coal - from low cost Asia seaborne imports and growing domestic production - will ensure that coal will remain the dominant fuel choice for India's power sector, despite growth in alternative sources, such as nuclear and renewables. We forecast coal to contribute 66% to India's power generation mix in 2025.

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