

Emerging Business Opportunities in Power Transmission & Distribution sector in India by 2020

<https://marketpublishers.com/r/E20A2625C99EN.html>

Date: December 2015

Pages: 346

Price: US\$ 8,015.00 (Single User License)

ID: E20A2625C99EN

Abstracts

Inadequate power evacuation infrastructure has been the biggest drag on the overall power sector in India. For years, adding generation capacity remained top priority which led to significant gaps between power that could be produced and power that could be evacuated and supplied to the last mile power consumer. Inadequate power evacuation infrastructure has also limited transfer of power from power surplus areas like the Eastern Region to power deficit states in Southern Region. In the state of Tamil Nadu, lack of adequate power evacuation infrastructure has made wind power generators back down as a result full potential of installed wind power capacities in the state remains untapped. Increasing installation of renewable energy capacities in almost every state in India would put tremendous stress on existing transmission infrastructure and would entail significant investments in setting up new transmission projects that's resilient to accommodate these unpredictable sources of power generation. Roughly ~7 MA of power evacuation capacity is required for every 1 MW of power generation and this would translate to requirement of about 1923 GVA for existing installed capacity of 275 GW, however, currently the overall power evacuation infrastructure is about 1100 GVA, which means gap of nearly 823 GVA. Infrainsights is of the view that significant upgradation of existing substations will be done to bridge this gap and additional 700 GVA new capacity will be added to accommodate 100 GW of new power generation of capacities slated to be commissioned over next 5 years.

Need for adding over 1000 GVA of power evacuation Infrastructure is inevitable and will require significant amount of capital to be pumped in to achieve the same over the period of next 5 years. Infrainsights is of the view that \$80-100 billion dollars will be the investment in the transmission sector and the same will be pumped in setting up new inter / intra state transmission projects, upgrading & retrofitting of existing substations, capacity expansion of existing substations. These projects will lead to significant

demand for power conductors (OPGW, ACSR), insulators, transmission towers, substation equipment (power transformer, switchgears / panels), IT / OT technologies like FACT etc.. Infrainsights is of the view that impact of several years of ignorance of transmission sector power transmission sector. Ministry of Power (MoP) has already announced that Transmission projects of Rs 1 lakh cr will be bid in 6 months (MoP). Power distribution sector will see investments in strengthening the MV & LV network to stem the AT&C losses and this will involve projects like self-healing distribution grid, adding distribution transformers, rolling out smart meters, feeder segregation, overhead network to underground network etc... Government has announced its intent to focus on distribution sector through IPDS programme. Integrated Power Development Scheme will cover works relating to strengthening of sub transmission and distribution system.

Infrainsights research report 'Emerging Business Opportunities in Power Transmission and Distribution Sector in India by 2020' to qualify and quantify the emerging business opportunity for companies manufacturing power transformers, distribution transformers, power conductors, switchgears, energy meters, insulators, transmission towers etc. Report will provide data, information and insights that will be helpful for companies to firm up their business strategy to tap into the emerging opportunities that's likely unfold due to significant amount of capital expenditure by public and private companies in Transmission and Distribution sector. 24X7 power for all is impossible if government doesn't fill the power evacuation infrastructure gap and be ahead in the curve as far as accommodating planned power generation capacities.

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