

Power Transmission in India 2017 Industry Analysis, Growth, Size, Share, Trends, Forecast to 2022

Power Transmission -Market Demand, Growth, Opportunities and Analysis Of Top Key Player Forecast To 2022

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Description

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- A conducive policy framework has helped the transmission sector to develop at a significant growth rate consistently.
- As of December 2016, the total transmission line length and transformer capacity stood at 362,121 circuit km (ct km) and 689,984 MVA (excluding high voltage direct current) respectively, at 220 kV and above.
- In 2015-16, transmission line length addition stood at 28,114 ct km – the highest ever increase in a single year, while transformer capacity grew by 61,349 MVA.
- Meanwhile, interregional transmission capacity grew from about 58,050 MW in 2015-16 to 62,550 MW by end-December 2016.

Key Projects

- The transmission sector continues to move towards higher voltages and critical ± 800 kV HVDC projects were commissioned in 2015-16 and 2016-17 by Power Grid Corporation of India Limited.
- These include the 3,506 ct km long Biswanath Chariyali (Assam) to Agra (Uttar Pradesh) bipole line – the first HVDC line commissioned in September 2015.
- In September 2016, ± 800 kV Champa to Kurukshetra (2,574 ct km) bipole line was also commissioned.
- Besides, Powergrid also operationalised the 1,200 kV National Test Station at Bina in Madhya Pradesh in May 2016 build with equipment from major public and private equipment suppliers.

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Private Sector Participation

- Private players bagged all (6) tariff- based competitive bidding (TBCB) projects awarded during January-December 2016.
- While Sterlite Power Transmission has the most TBCB projects in its portfolio, Adani Transmission is fast emerging as a major player through key mergers and acquisitions during 2016-17.
- About eight TBCB projects aggregating over Rs 100 billion are presently under various stages of bidding. Foreign transmission companies including China Southern Power Grid International have evinced interest in entering the Indian transmission sector in the latest round of TBCB projects' tender.

Policy and Regulatory Framework

- The policy and regulatory framework has kept pace with the evolving sector needs.
- In this context, steps have been taken to shelve off Powergrid's central transmission utility (CTU) status to ensure a more level playing field between Powergrid and private players, revise transmission planning guidelines, incentivize early completion of projects, and revisit the standard bidding documents for TBCB, among others.
- In addition, the Central Electricity Regulatory Commission notified regulations to introduce ancillary services and for forecasting wind/solar energy output by interstate developers.

Renewable Energy Integration

- With the union government's announcement of ambitious plans to scale up renewable energy to 175 GW by 2022 from just about 47 GW at present, the pressure to develop associated power evacuation infrastructure has increased.
- In this context, Powergrid is implementing projects under Green Energy Corridors -I and II.
- Around 17,000 ct km of lines and 34,650 MVA of substation capacity is envisaged to be added at interstate and intra-state levels under GEC-I to support 33 GW of solar and wind power.
- Meanwhile, GEC-II would help evacuate 20,000 MW of solar capacity from upcoming parks.

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Cross-Border Interconnections

- India is actively building/planning to build cross-border transmission links with the SAARC member states to enable power trade with an objective of a unified regional power grid.
- Currently, India has operational cross-border interconnections with Bangladesh, Bhutan, Myanmar and Nepal.
- Five more interconnections – one each with Bangladesh and Nepal and three with Bhutan, are already under construction
- Besides, interconnections with Sri Lankas and Pakistan are under discussion.

Inter-state Comparison

- The state transmission utilities of Gujarat, Maharashtra and Karnataka own the largest share of line length among 24 utilities surveyed by India Infrastructure Research.
- The STUs of Uttar Pradesh and Rajasthan are the only ones with network at 765 kV.
- In terms of substation capacity, STUs of Maharashtra, Gujarat and Uttar Pradesh have the largest shares (in that order).
- The transmission losses of utilities ranged between 0.85 per cent (Delhi) to 5.18 per cent (Uttar Pradesh).
- The utilities have envisioned significant capacity addition under the Power for All initiative.

Future Outlook

- As per Central Electricity Authority's draft National Electricity Plan (NEP) Transmission 2016, a line length addition of 105,580 ct km and substation capacity addition of 292,000 MVA is envisaged during the Thirteenth Plan period (2017-22).
- This would entail an investment of Rs 2.6 trillion for 2017-22.
- India Infrastructure Research estimates that the transmission network infrastructure would reach 577,797 ct km and 1,291,796 MVA by 2025 and entail an annual investment of Rs 560-590 billion during 2017-25 period.

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The report has four sections with nineteen chapters:

Section I: Sector Analysis

- Executive Summary
- Sector Size and Growth
- Recent Developments (past 12 months)
- Policy Developments
- Regulatory Developments
- Inter-utility Comparison
- Private Sector Participation
- Transmission Tariffs

Section II: Outlook and Projections

- Future Outlook
- Utility Plans under the Power for All Initiative
- Network Growth Projections (2016-25)

Section III: Key Projects

- High Capacity Power Transmission

- Corridors
- Renewable Energy Integration Projects
- Tariff-based Competitive Bidding Projects
- Cross Border Interconnections
- Intra-state Projects

Section IV: Transmission Utility Profiles*

- Central Transmission Utilities
- State-owned Transmission Utilities
- Private Transmission Companies

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Contact Us: Sales@Wiseguyreports.Com Ph: +1-646-845-9349 (Us) Ph: +44 208 133 9349 (Uk)

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Wise Guy Reports

+91 841 198 5042

[email us here](#)

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