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Augmenting Value

June 2020

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Category – Market Research


COVID'19 Economic Impact on PPPs will place a tremendous burden on Stakeholders – Monitoring PPP Projects' Status in India

Public Private Partnership Projects Monitor in India - 2020

Coverage >

 COVID-19 – Impact on Indian PPP Projects

 The Need For Strategic Focus on Mitigation & Recovery

 Business Case for PPP Projects in India

 PPP Project Monitor - Report Insights

 PPP Project Monitor – Key Highlights

 PPP Project Monitor – Key Queries Addressed

Report Rationale




COVID'19 – The Need is for Strategic Focus on Mitigation of Risks & Recovery of Pace on the Implementation of PPP Projects

Government need to proactively engage with their private sector partners to mitigate PPP project impacts as soon as they surface post pandemic comes to an end

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Eninrac reports are a combination of logical thinking and analysis on industry issues that matter the most and assist our clients to stay ahead of the market happenings.

 **Value Augmentation**

The project monitor presents list of all PPP projects under various stages of implementation and their exposure to risks post COVID - 19



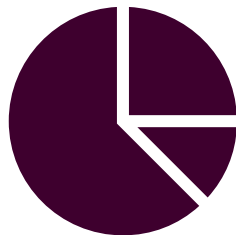


How Will Coronavirus impacts Public Private Partnership?

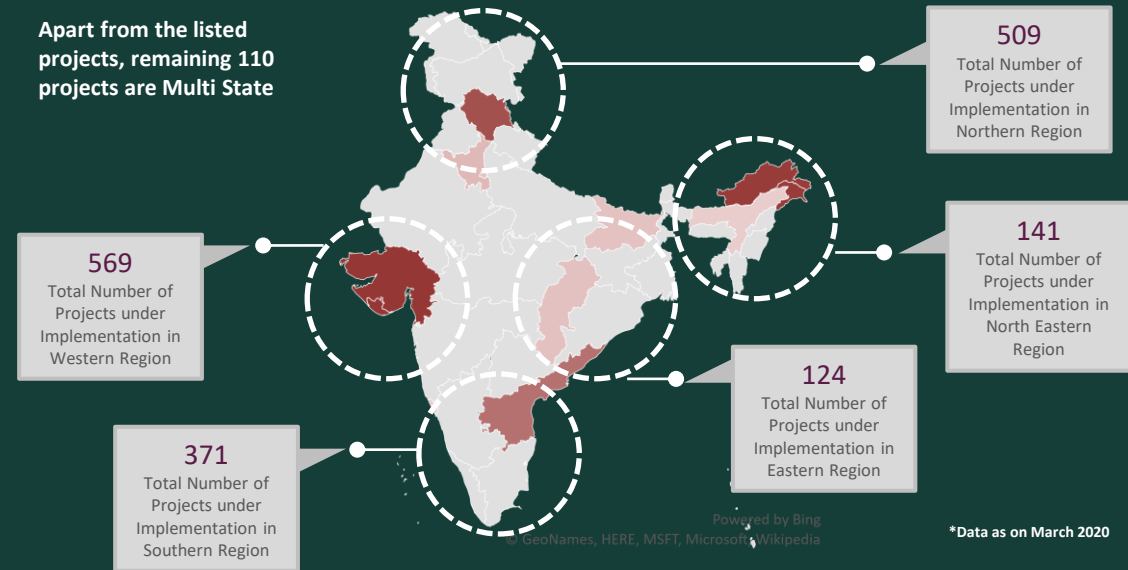
With reduced economic activity, due to pandemic outbreak, PPP Projects (especially in transportation sector) will experience considerable revenue growth challenges. In most instances, the vulnerability scope and extent to this force majeure risk was not foreseen in PPPs that rely directly on revenues generated by user fees. The major impact shall be witnessed by toll roads (lack of users due to lockdown) and airports (loss of gate fees, refueling fees, airport commercial concessions). Even PPPs that receive revenue through availability of payments might suffer in long term, as government face shrinking economy that will result in declining tax revenues and reduced budgetary allocations to honor the existing commitments to the contracts.

As on March 2020, a total number of 1824 PPP projects worth USD 327 Billion are on different stages of implementation in India. Out of these approximately 57% of the projects fall under transportation sector, which in turn, is exposed to maximum risk due to coronavirus outbreak.

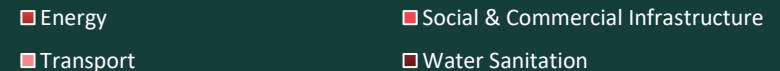
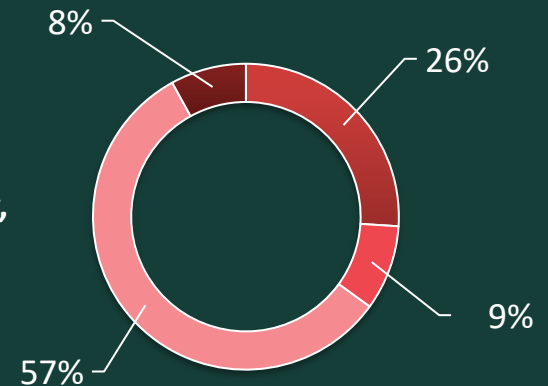
57% of the PPP Projects in India fall under Transport Sector comprising of Airports, Inland Waterways, Railways & Roads



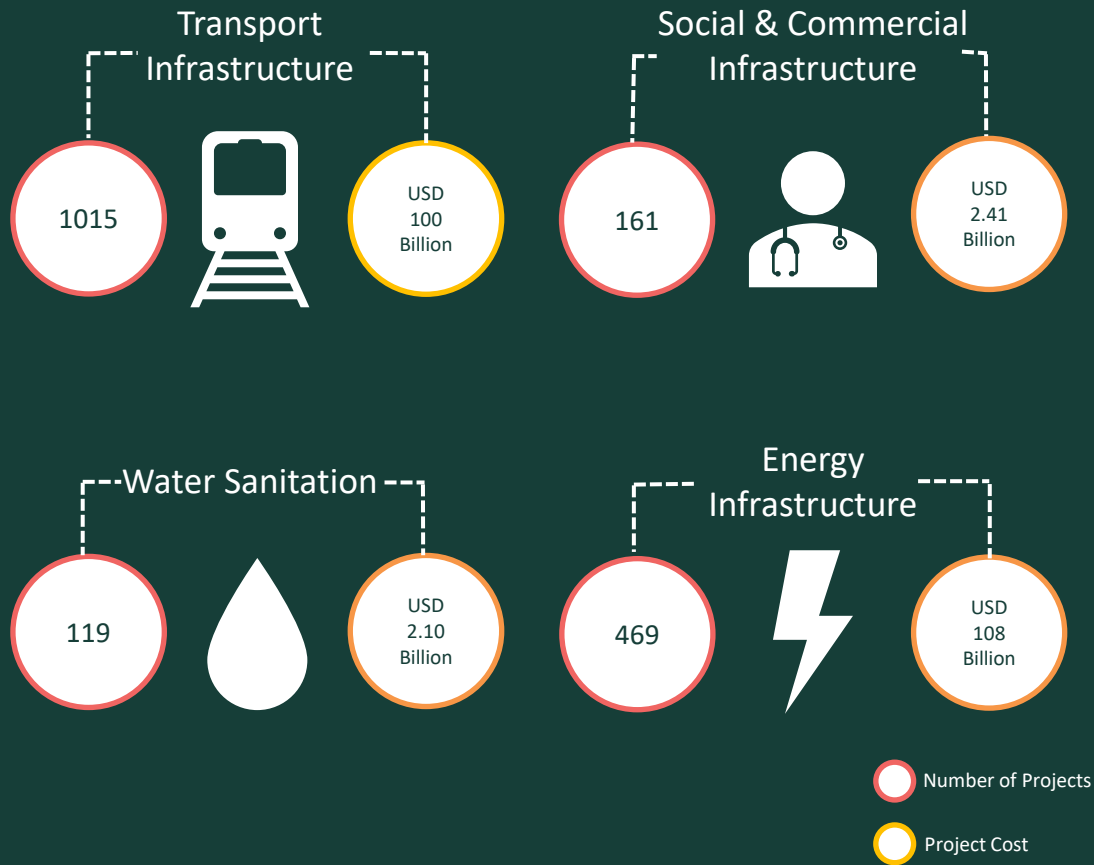
Region Wise Split of PPP Projects in India*



The four major sectors where PPP projects are allocated in India are Energy, Social & Commercial Infrastructure, Transport & Water Sanitation



PPP Projects – Sector Wise PPP Projects with respective Investments for Major Sectors in India



Government's Push towards Infrastructure Projects is Expected to Boost Capital Expenditure by 1.9% of GDP by 2022-23

PPP Projects – The Need For Strategic Focus on Mitigation & Recovery

The current global health crisis doesn't need any introduction and is one of the biggest ever witnessed by the mankind. Government need to proactively engage with the private sector partners to mitigate the impacts arising due to the pandemic as soon as they surface. Failure of PPP projects should not be an option. Also, it is imperative that the private sector should be assured that, as soon as problems arise, they can approach their public sector partners and share project impacts without fear of penal actions that could unilaterally blame them for impacts. Further, it is important that the recovery plans are harmonized with the strategic plans and national strategic priorities.

Recovery planning will only be effective if short term, medium term and long-term strategies are embraced that address necessary mitigation strategies for next few weeks and coming months. Having said so, the coronavirus will most certainly offer new resilience opportunities for the stakeholders as the PPP market recalibrates. In the meantime, truly sustainable and resilient PPPs should be promoted to help mitigate the coronavirus' impacts to vulnerable communities and those that are already grappling with them.

By the medium of this report eninrac team attempts to assess the impact of global health crisis on Indian PPP projects across different sectors. The project monitor covers the list of all PPP projects under various stages of implementation and their exposure to risk post COVID – 19. Further, the project monitor shall also cover region wise investment scenario along with the details of all the related stakeholders.



BUSINESS CASE FOR PPP PROJECTS IN INDIA

- Govt's Infra push critically dependent on project preparation and private sector participation;
- Initiatives for building up components of the agri-logistics and national cold chain are on cards;
- Krishi UDAN to be launched by the Ministry of Civil Aviation for international and national routes to improve value realisation, and Kisan Rail to be set by Indian Railways through PPP for transporting perishable goods;
- INR 1.70 Trillion of investment for Infrastructure Projects is pegged by the Government under National Infrastructure Pipeline (NIP);
- Government is expected to spend USD 18 Billion to fight Coronavirus impact, in which the maximum share will go for developing Healthcare Infrastructure;



REPORT INSIGHTS

- Understanding PPP Framework and its adaptation penetration in India;
- Assessing Risk & developing Risk Mitigation Strategies arising due to Coronavirus for different PPP Projects in India;
- Determining opportunity size as per investments in different segments which are apt for PPP model in India;
- Opportunity determination under PPP model and tracking projects on state wise basis for water sanitation projects;
- Opportunity determination under PPP model and tracking projects on state wise basis for transportation projects;
- Opportunity determination under PPP model and tracking projects on state wise basis for social & commercial infrastructure including healthcare;
- Opportunity determination under PPP model and tracking projects on state wise basis for energy infrastructure;
- Opportunity determination under PPP model and tracking projects on state wise basis for telecommunication networks and services;



KEY HIGHLIGHTS

- Examining the impact of Covid – 19 on Indian PPP Projects;
- Evaluating Mitigation strategies post pandemic for Indian PPP Projects;
- Examining the performance & understanding the dynamics of PPP Projects;
- Evaluating key challenges in implementation of PPP Projects;
- Examining PPP Opportunities in Water Sanitation Infrastructure by 2022;
- Examining PPP Opportunities in Transport Infrastructure by 2022;
- Examining PPP Opportunities in Social & Commercial Infrastructure by 2022;
- Examining PPP Opportunities in Energy Infrastructure by 2022;
- Examining PPP Opportunities in Telecommunication Network and Services by 2022;



KEY QUERIES ADDRESSED

- What is the opportunity size as per investments under different segments which are apt for PPP model in India?
- Why PPP model can be viable for future in India as per budgetary allocations in India?
- What shall be the opportunity under PPP model and tracking state wise projects for Water Sanitation Sector in India?
- What shall be the opportunity under PPP model and tracking state wise projects for Transport Sector in India?
- What shall be the opportunity under PPP model and tracking state wise projects for Social & Commercial Sector in India?
- What shall be the opportunity under PPP model and tracking state wise projects for Energy Sector in India?
- What shall be the opportunity under PPP model and tracking state wise projects for Telecommunication & Network Services in India?



MUST BUY FOR

- Private Project Developers;
- EPC Service Providers;
- Turnkey Solution Providers;
- Project Financing Agencies;
- Original Equipment Manufacturers;
- Project Contractors;
- Heavy Equipment Suppliers;
- Small-Medium Equipment Suppliers;
- Raw Material Suppliers;
- Research Bodies;
- Industry Associations;
- Technical Consulting Groups
- Project Consultants;
- Financial Institutions;



COMPANNIES MENTIONED

- National Highways Authority of India;
- State Specific Water Resources Departments;
- Ste Specific Urban Development Agencies;
- Central Public Works Department;
- State Specific Public Works Department;
- NHPC Limited;
- NTPC Limited;
- Indian Railways;
- New Mangalore Port Trust;
- Navayuga Dhola Infra Projects Private Limited;
- Abellon Clean Energy Limited;
- Vizag General Cargo Berth Private Limited;
- Dhamra Port Company;
- Essar Limited;
- JITF Urban Infrastructure;
- A2Z Infra Projects Private Limited;
- Airports Authority of India;
- GMR Group;
- Reliance Infrastruture;
- TATA;
- IRB Infrastructure Developers;
- Dilip Buildcon,
- NEC Group;





CONTENTS & COVERAGE

- Current Status Track of PPP Model in India & its Adaptation;
- PPP & Rising Infrastructure Investments;
- Aligning PPP into Areas to make genuine Difference by Private Players in India;
- Inefficiencies in Infrastructure – Limiting Growth & Increasing PPP Opportunity in India;
- Analysing Risks and Providing Mitigation Strategy for PPP Projects due to Coronavirus Outbreak;
- Examining key challenges to PPP Projects Implementation in India;
- Opportunity under PPP model and tracking state wise projects for Water Sanitation Sector in India till FY 2022;
- Opportunity under PPP model and tracking state wise projects for Transport Sector in India till FY 2022;
- Opportunity under PPP model and tracking state wise projects for Social & Commercial Sector in India till FY 2022;
- Opportunity under PPP model and tracking state wise projects for Energy Sector in India till FY 2022;
- Opportunity under PPP model and tracking state wise projects for Telecommunication & Network Services in India till FY 2022;
- PPP in Enhancing Social Impact in India;
- Projects Database of all Upcoming PPP Projects in India;



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The life of a man consists not in seeing visions and in dreaming dreams, but in active charity and in willing service

- Henry Wadsworth Longfellow

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