

Study on Examining the Power Situation & Estimating Latent Power Demand in India

Navigating the actual power demand estimation
and surfacing the gap

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Project Specifics

Client Origin

India

Project Duration

255 Days

Advisory Type

Operations and Strategy

Geography

Pan India

Client's Requirement

The Problem Statement



The client wishes to commission a gap examination study in typical power demand estimation process for select few Indian states (West Bengal, Uttar Pradesh, Andhra Pradesh & Maharashtra). The client wants to unleash the latent power demand in these states and the mechanics behind estimating the same. Further, it wishes to understand key regions to be targeted for increasing their revenue and a strategy for making the state discoms inclusive in the process.

Broader View

Breaking the scope for
making solution

(eninrac's "B&M" approach)



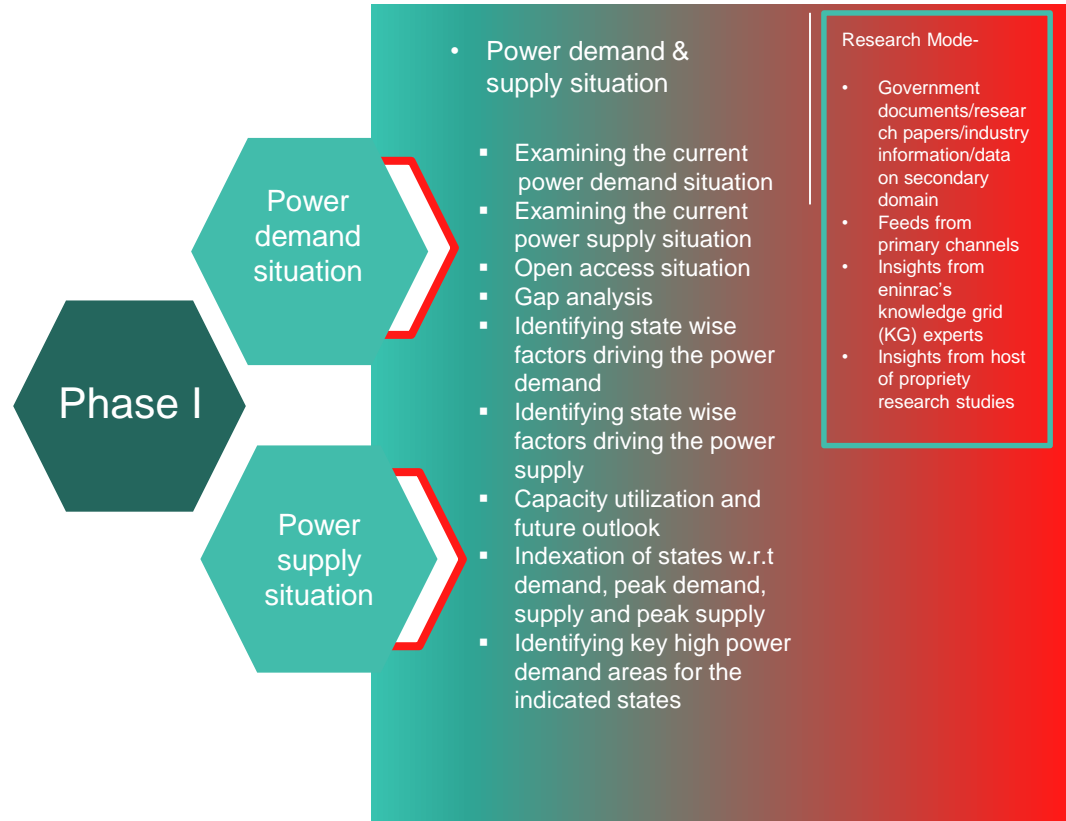
Scope is broadly split into following phases -

- Phase I : Power demand -supply build up and drivers
- Phase II : Power generation scenario and its outlook
- Phase III : Power demand situation analysis & examining the operational & financial health of state discoms
- Phase IV : Regulatory & Policy landscape
- Phase V : Detailed assessment of latent power demand

Scope Approach

Going step by step

(eninrac's "Laddered" approach)



Phase II

Thermal power generation

- Power generation – current
 - Current status of power generation
 - Capacity breakup
 - ❖ State wise
 - ❖ Source wise (coal, gas, hydro, RE, nuclear)
 - ❖ Player wise

Hydro,RE power generation

- Power generation – outlook
 - Outlook of power generation
 - Capacity breakup
 - ❖ State wise
 - ❖ Source wise (coal, gas, hydro, RE, nuclear)
 - ❖ Player wise
 - ❖ Year wise
 - Power generation plans for each state

Research Mode-

- Insights from the primary interface with the industry experts and channel checks
- Interactions with industry associations & government bodies – MoP, PTC, POSOCO, NLDC, state power department's
- Insights from power distribution companies
- Insights from power transmission companies
- Insights from power generation companies
- Feed from eninrac's knowledge grid (KG) experts
- Government documents/research papers/industry information/data on secondary domain

Phase III

Power demand-supply gap

- Demand-supply gap assessment
 - Demand supply scenario of the state with transmission loss levels hitting the demand-supply matrix
 - Model based assessment of power demand-supply scenario
 - Scenario building & back casting approach across the state with distinct categories of consumers factored in

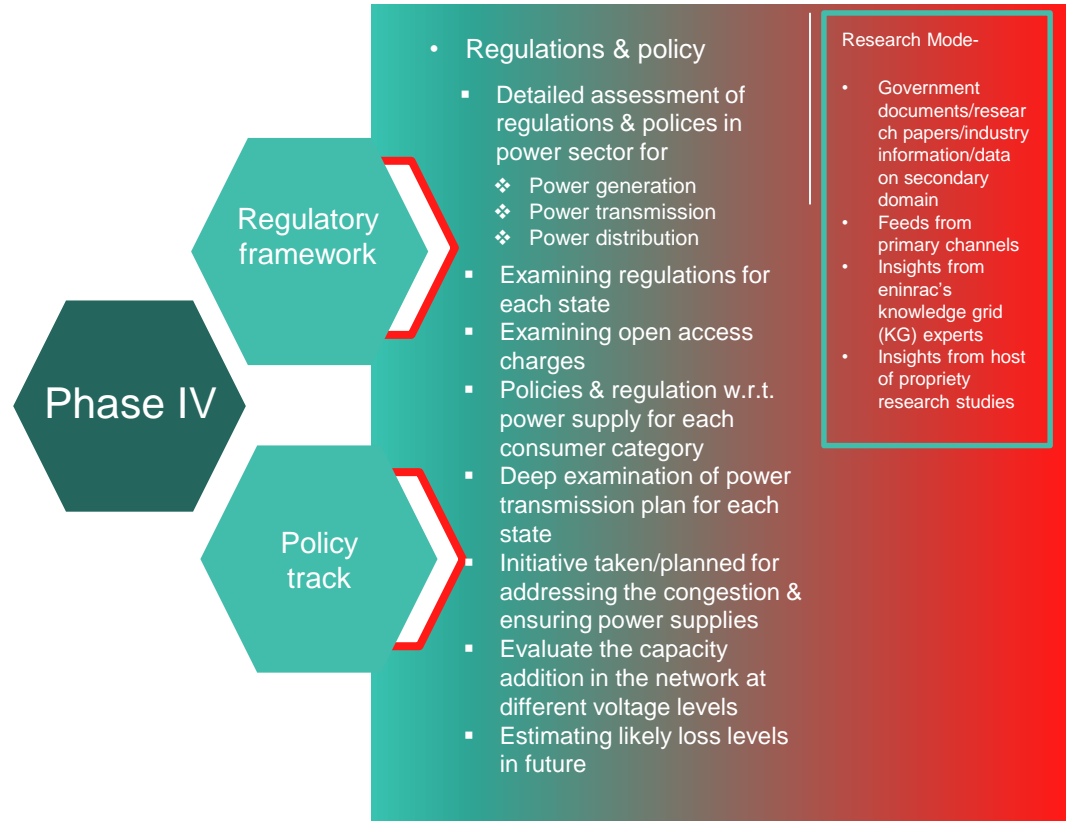
Situation of discoms

- Financial & operational health of discoms
 - Impact assessment of UDAY upon the financials of discoms
 - Identifying the operational challenges of discoms
 - Future plans of the discoms

Scope Approach

Going step by step

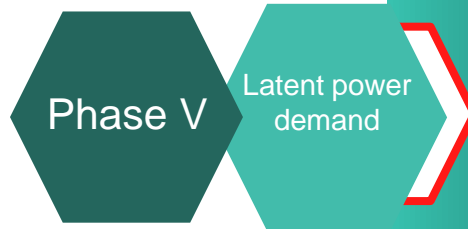
(eninrac's "Laddered" approach)



Scope Approach

Going step by step

(eninrac's "Laddered" approach)



- Assessment of latent power demand
 - Power supply outlook in the state as per consumer category at different voltage level
 - The extent of CPP capacity addition
 - Off-grid installation
 - Industrialization rate examining of each state
 - Paying capability examination of each state
 - Urbanization rate examination
 - Living standard rate examination
 - Eninrac derived an exclusive D2I (Data to Information) model with close to a dozen factor with sensitivities factored in to determine the latent power demand for future in the states considered for study

Research Mode-

- Primary feeds collected from a survey conducted in varied districts of each state
- Feeds regards the economic status collected covering – industrial setup , infra development, living standard etc.
- Feeds regards the type of electrical appliances usage and the connected load collected for all consumer categories



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