Power Grid Corporation of India Limited

Press & Analysts' Meets

Mumbai

May 27, 2016

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Major Highlights

POWERGRID Overview

Sector Overview & Performance

Performance (FY16)
- Financial
- Operational

Journey - Last 5 years

Performance (FY16) – Consultancy, Telecom, CSR & Sustainability

Projects Targeted in FY17 & Status of TBCB Projects

Outlook, Investment Programme & Way Forward

Major Recognitions

Major Highlights

POWERGRID Stock getting included[1]

Thank You

for your continued faith & confidence

1- w.e.f. 20-Jun-2016; Source: BSE Notice dated 20-5-16

FY16: Major Highlights

₹ 31,788 crore

- **Highest ever yearly Capitalization**

13,717 ckm

- **Highest ever TL ckm addition (Annual)**

Financials scale new peaks

- Gross Fixed Assets surpassed ₹ 1.5 lakh cr.
- Annual Income surpassed ₹ 20,000 crore
- Profit After Tax surpassed ₹ 6,000 crore

FY16: Other Highlights

NER-Agra HVDC (Pole-I)	**World's longest multi-terminal ±800kV HVDC Tr. Line commissioned**
SAARC Interconnections	**Additional Link(s) with Nepal & Bangladesh completed & operationalised**
Projects acquired through TBCB	**1st line* successfully charged in time** *** 400kV D/C Khammam – Nagarjunasagar**

Support in Natural Calamities

- Nepal Earthquake (Apr-15)
- Chennai floods (Dec-15)
- Manipur Earthquake (Jan-16)

POWERGRID Overview

POWERGRID Today

A '*NAVRATNA*' ENTERPRISE	CENTRAL TRANSMISSION UTILITY	LISTED COMPANY since 2007	GOVT. SHAREHOLDING 57.90%	PAYING DIVIDEND SINCE 1993-94	Market Capitalization ₹ 72,771 crore[1]

- ✓ **>90% ISTS Transmission Network owned by POWERGRID**
- ✓ **Trans. Lines: 1037 Nos. - ~ 129,600 ckm**
- ✓ **Sub-stations: 208 Nos. - ~ 255,000 MVA**

400kV & above: >90%

- ✓ **State-of-the-art technologies like HVDC, SVC, FACTS etc.**
- ✓ **>45% power generated in India transmitted through POWERGRID**

CREDIT RATINGS

Domestic

CRISIL	ICRA	CARE
AAA, Stable	AAA, Stable	AAA

International

S&P	Fitch
BBB (-), Stable Outlook	BBB (-), Stable Outlook

1- Based on BSE Closing Price of ₹ 139.10 per sshar as on 31.3.2016
Physical Data as on 30.04.2016

POWERGRID Group

पावरग्रिड

Government of India 57.90%

Institutions 34.80%

Non-Institutions 7.30%

पावरग्रिड

Shareholding pattern as of 31st March, 2016

Joint Ventures (13)
(% POWERGRID equity holding)

- Powerlinks Trans. Ltd. (49%)
- Torrent Power Grid Ltd. (26%)
- Parbati Koldam Trans.Co. Ltd. (26%)
- Bihar Grid Company Ltd. (50%)
- Cross Border Power Trans. Co. Ltd. (26%)
- National High Power Test Laboratory (20%)
- Energy Efficiency Services Ltd. (13.64%)
- North Eastern Trans. Co. (26%)
- Jaypee Powergrid Ltd. (26%)
- Teesta Valley Power Trans. Ltd. (26%)
- Kalinga Bidyut Prasaran Nigam Pvt. Ltd. (50%)
- Power Transmission Co. Nepal Ltd. (26%) (POWERGRID's 1st Intl JV)
- RINL POWERGRID TLT Pvt. Ltd. (50%)

Dividend Paying

Subsidiaries (11)
(100%)

- POSOCO (Grid Management)
- Grid Conductors Limited

Cos. Acquired through TBCB

1. POWERGRID NM Trans. Ltd.
2. POWERGRID Vemagiri Trans. Ltd.
3. POWERGRID Vizag Trans. Ltd.
4. POWERGRID Unchahar Trans. Ltd.
5. POWERGRID Kala Amb Trans. Ltd.
6. POWERGRID Jabalpur Trans. Ltd.
7. POWERGRID Warora Transmission Ltd.
8. POWERGRID Parli Transmission Ltd.
9. POWERGRID Southern Interconnector Trans. System Ltd.

Shareholding in PTC 4.1%

Sector
-
Overview & Performance

Power Sector Overview & Performance

Generation & Power Supply

	Installed Capacity incl. RE (GW)	RE Capacity (GW)
At the end of FY12 (Mar-12)	200	24.5
At the end of FY16 (Mar-16)	302	42.8
Addn. in 4 years (Apr12-Mar16)	102	18.3
Addn. in FY16	30	7.1

Per Capita Consumption: 1075 kWh (2015-16 Prov.)

Energy Generated in FY16

- 1,107 BU (5.6% ↑)
- RE Generation: 60.5 BU (Apr15-Feb16)

Power Supply Position in FY16

- Energy Deficit: 2.1% (23.5 BU)
- Peak Deficit: 3.2% (5 GW)

Source: CEA website / GoI

Power Sector Overview & Performance (contd.)

Transmission Infrastructure

	Transmission (ckm)	X-formation Capacity (MVA)	I-R Capacity (MW)
At the end of FY12 (Mar-12)	257,481	409,551	27,750#
At the end of FY16 (Mar-16)	341,551	658,949	58,850#
Addn. in 4 years (Apr12-Mar16)	84,070	249,398	31,100
Addn. by POWERGRID	36,123	130,823	24,900
Addn. in FY16 by POWERGRID only	13,717	23,578	12,400

including 600MW I-R Capacity pertaining to 132kV lines

For voltage levels 220kV & above

Power Transmission – An Enabler for seamless flow of power

FY16

I-R Exchange
117 BU (31%↑)

STOA – Txns
44,545 (17%↑)

STOA – Energy Txn.
98 BU (21% ↑)

Source: CEA website/ POWERGRID/ POSOCO

POWERGRID- Major Assets commissioned in FY16

Transmission Lines	Sub-Stations	Inter-Regional Capacity
13,717 ckm	15 Nos. 23,578 MVA	12,400 MW

Major Lines

- Bareilly-Kashipur,
- V'chal – Satna, V'chal-Satna (2nd line)
- Meerut – Moga
- Barh-Gorakhpur
- Raigarh - Champa
- Silchar – Purba Kanchan Bari
- Vijayawada – Nellore
- Gwalior – Jaipur, Jaipur-Bhiwani(2nd line)
- Biswanath Chariyali – Agra (NE-NR/WR Interconnector) & associated AC system
- Mysore-Kozhikode
- Kudgi-Kolhapur
- Gooty – Madhugiri
- Ranchi-Dharamjaygarh; Dharamjaygarh–Jabalpur
- Kurnool-Raichur
- Angul – Jharsuguda (2nd line)
- Balia – Varanasi,
- Kishenganj-Patna
- LILOs- Meerut-Kaithal

Sub-stations

- Vindhyachal PS
- New Melli (GIS)
- Champa PS
- Vadodara (GIS)
- Mokokchung (GIS)
- Biswanath Chariyali AC#
- Biswanath Chariyali HVDC
- Agra HVDC
- Kozhikode
- Kudgi (GIS)
- Kolhapur (GIS)
- Madhugiri (GIS)
- Kurukshetra (GIS)#
- Kishenganj (GIS)
- Varanasi (GIS)

Initially envisaged as part of HVDC

Inter-Regional

- Barh – Gorakhpur
- Gwalior-Jaipur
- Biswanath Chariyali – Agra (NE-NR/WR Interconnector) – Pole I
- Ranchi-Dharamjaygarh
- Kudgi-Kolhapur
- Extn. of Biharsharif-Sasaram to Varanasi

SAARC

Transnational Interconnections

- **India-Bangladesh** (Surjyamaninagar-Comilla)
- **India-Nepal** (Muzzafarpur-Dhalkebar)

Enhancement of Capacity in last 2 years (FY15, FY16)

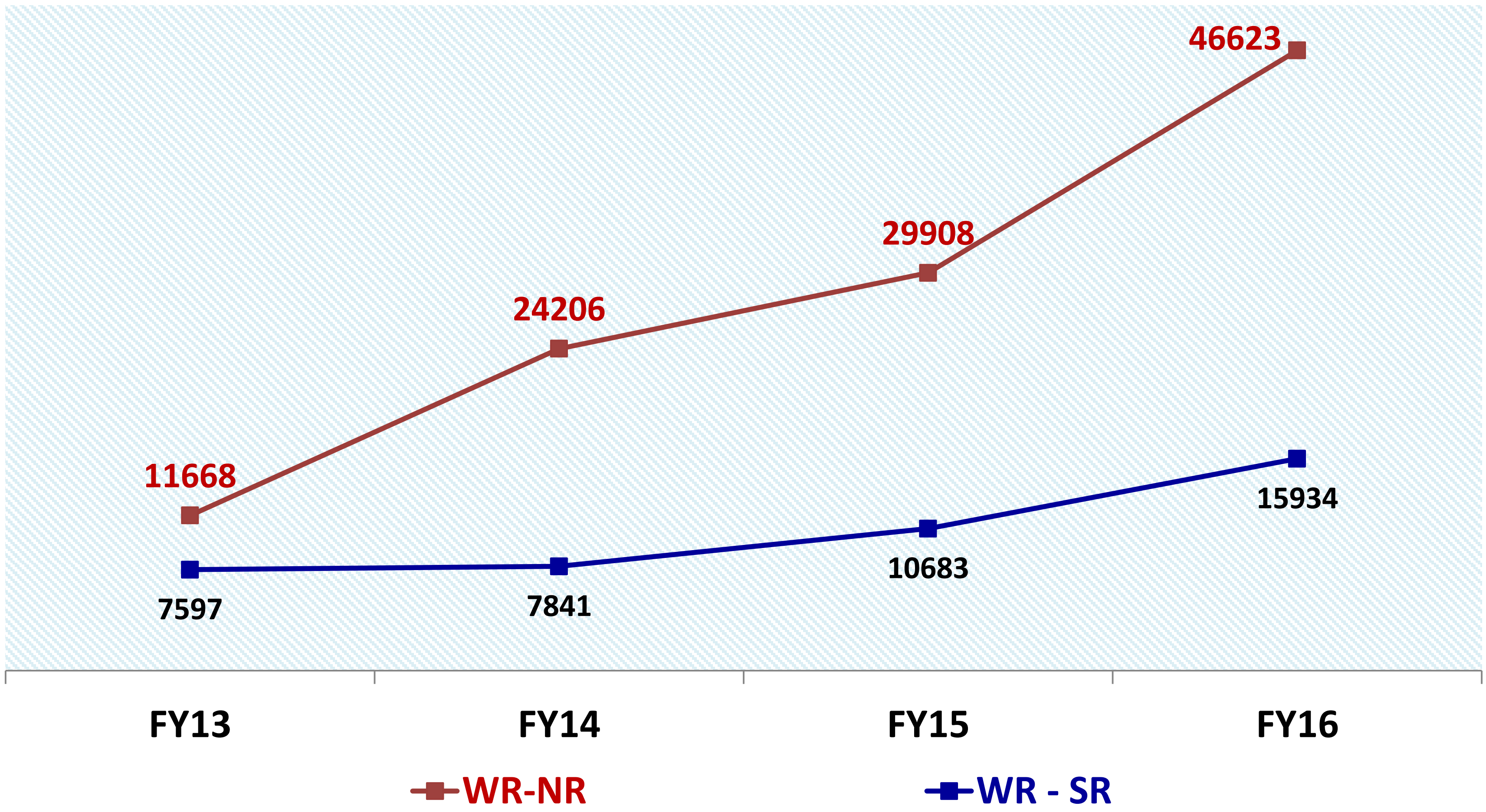
WR to NR:	NEW Grid to SR:
Capacity enhanced from 3,700 MW to 7,600 MW (105% ↑)	Capacity enhanced from 3,450 MW to 5,900 MW (71% ↑)

Targeted increase in Capacity in next 2 years (FY17, FY18)

WR to NR:	NEW Grid to SR:
Envisaged Capacity: 17,000MW	Envisaged Capacity: 9,900 MW
(Addn. envisaged in 2 yrs: 9,400 MW)	(Addn. envisaged in 2 yrs: 4,000 MW)

Transmission- Congestion Management

I-R Power flow from WR to NR & WR to SR (MUs)



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Source: POSOCO

Transmission- Positives Steps towards Project Execution

Improvement in Forest Clearance Process	Permission to start work after Stage-I/ In-principle approval
	Enhancement in delegation of powers of Regional Offices of MoEFCC
	Easing Compensatory Afforestation (CA) conditions in TBCB projects
Right of Way (RoW) Compensation (Reviewed)	New guidelines (in Oct, 2015) for compensation issued: - Compensation of land cost below tower base (85% of cost of land) - Compensation towards diminution of land value under RoW (15% of land cost) This is in addition to compensation provision prevalent earlier
Recognition to early completion	In the case of actual date of commissioning (COD) prior to Scheduled COD for Transmission Lines under System Strengthening Schemes - Developer entitled to claim Tr. charges from actual COD

Performance (FY16)

Performance (FY16)- Financial

(₹ in crore)				
Description	Quarter ended		Year ended	
	Standalone		Standalone	
Income	**31.03.2016**	**31.03.2015**	**31.03.2016**	**31.03.2015**
- Transmission Charges	5,492	4,468	**19,945**	16,521
- Consultancy – Services	163	157	**465**	381
-Telecom	105	79	**392**	275
- Other Income	201	206	**479**	603
Total Income	5,961	4,910	**21,281**	**17,780**
Operating Expenses (including prior period adjustment)	666	645	**2,456**	2,426
EBITDA-Gross Margin	**5,295**	**4,265**	**18,825**	**15,354**
Depreciation	1,785	1,418	**6,183**	5,085
Interest	1,477	1,038	**5,023**	3,979
Extraordinary Items (Net of Tax exp.)		-		0
Tax	434	397	**1,592**	1,311
Profit after Tax	**1,599**	**1,412**	**6,027**	**4,979**

Growth in Income : 20%

Growth in Profit After Tax: 21%

ONE Nation Grid Frequency

Performance (FY16) - Financial

		(₹ in crore)
Description	**As on 31.03.2016**	**As on 31.03.2015**
Gross Fixed Assets	**1,50,052**	118,264
Capital Work-in-Progress	**46,830**	56,292
Debt	**1,06,321**	93,845
Net Worth	**42,598**	38,037
Earning Per Share (₹)	**11.52**	9.52
Book Value per Share (₹)	**81.43**	72.71
Key Financial Ratios		
Debt : Equity	**71:29**	71:29
Return on Net Worth	**14.15%**	13.09%

Performance (FY16) - Financial

Billing & Realization

Billing	Realization	%age realization
₹ 19,178 crore	₹ 18,668 crore	97.34%

As on 31.03.2016

Total Outstanding	**~ ₹ 2,596 crore (50 days billing#)**
Transmission Outstanding (beyond 60 days)	**~ ₹ 367 crore (7 days billing#)**
Billed but not outstanding (<60 days allowed as per CERC)	**~ ₹ 2,229 crore (43 days billing#)**

 # Avg. Monthly Billing: ₹ 1598 cr. => 2 months 60 days) billing = ₹ 3,196 cr.

Performance(FY16) - Operational

- **Performance during FY16**
  - ✓ **Availability : 99.72%**
  - ✓ **Reliability : 0.66 Trippings/ line**

- **Assets as on Mar-16:**
  - ✓ **Trans. Lines : 1031 Nos. - 129,354 ckm**
  - ✓ **Sub-stations : 207 Nos. (incl. 24 GIS) - 255,348 MVA**
    (104 sub-stations remotely operated)

Voltage Landscape migrating to 765kV
(Mar'16 vs Mar'11)

- **TL (765kV & above): 17% vs <1%**
- **S/S (765kV & above): 19% vs <1%**

New Initiatives in Asset Management

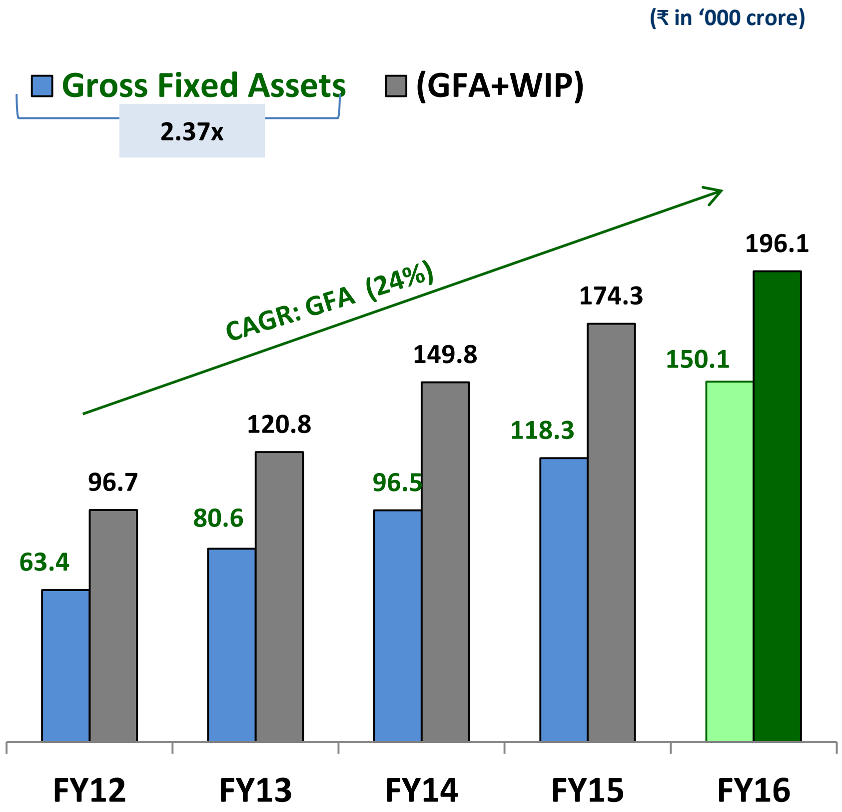
- **Aerial Patrolling (using helicopters) of 17,000 km of TL to commence shortly**
- **Use of Unmanned Aerial Vehicles (UAVs/ Drones) commences w.e.f Apr-16**

Journey (Last 5 years)

Journey (Last 5 years): Asset Creation

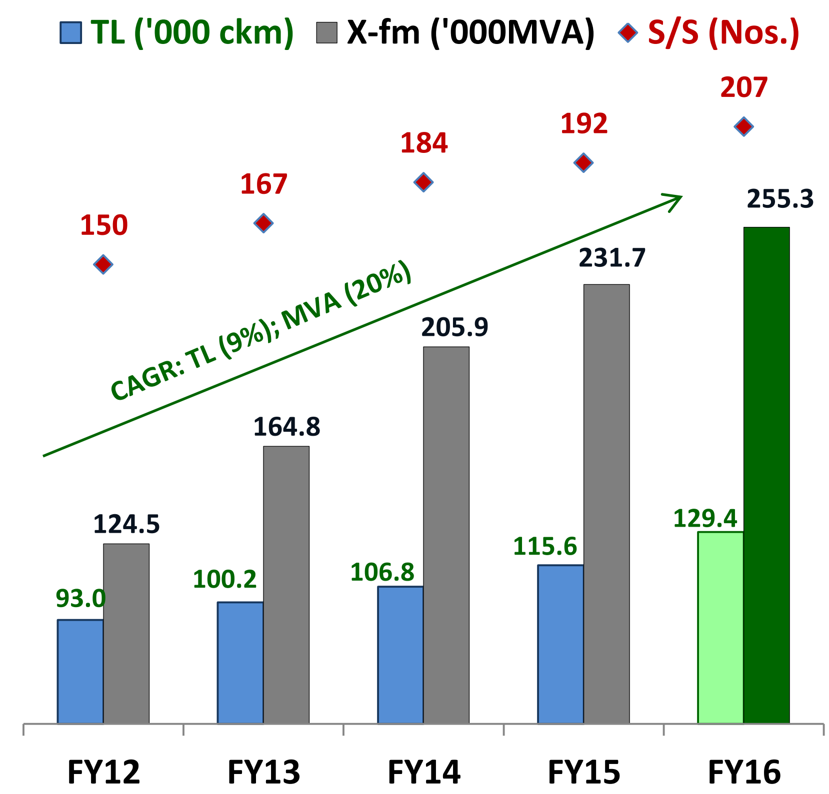
Consistent Asset Growth

Investment-led Asset Growth….



Poised to become 3rd Largest CPSE in the Country

… Consistent increase in ISTS Infrastructure

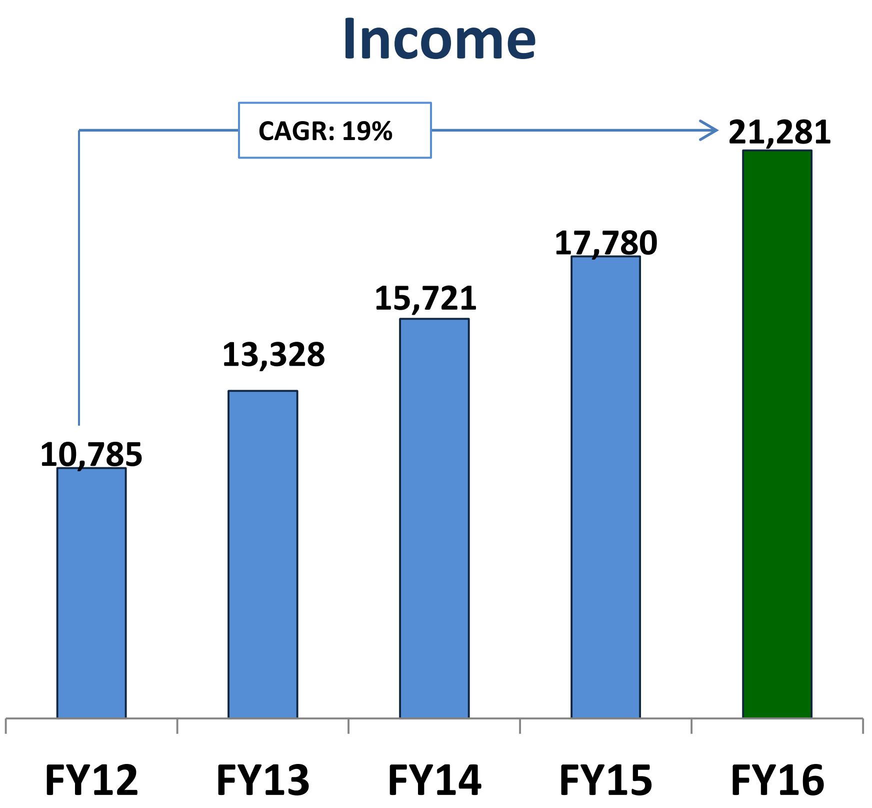


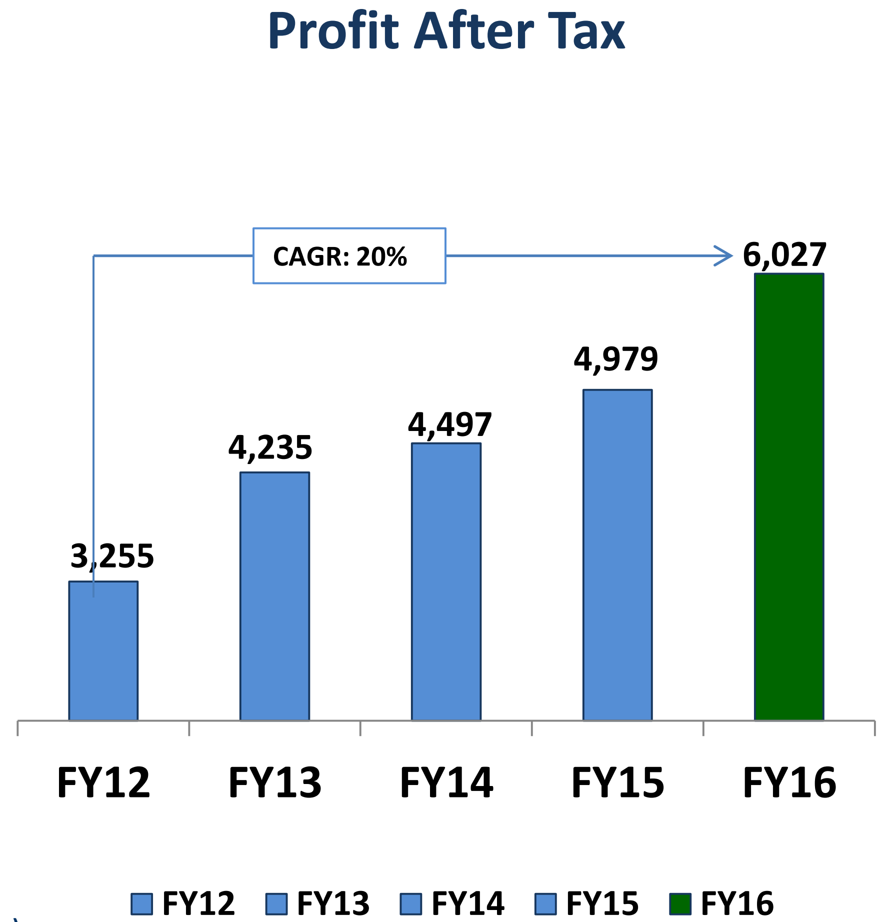
One of the Largest Trans. Companies Globally

ONE Nation Grid Frequency

Journey (Last 5 years): Profitability

Asset Based Returns & Sustained Profitability….



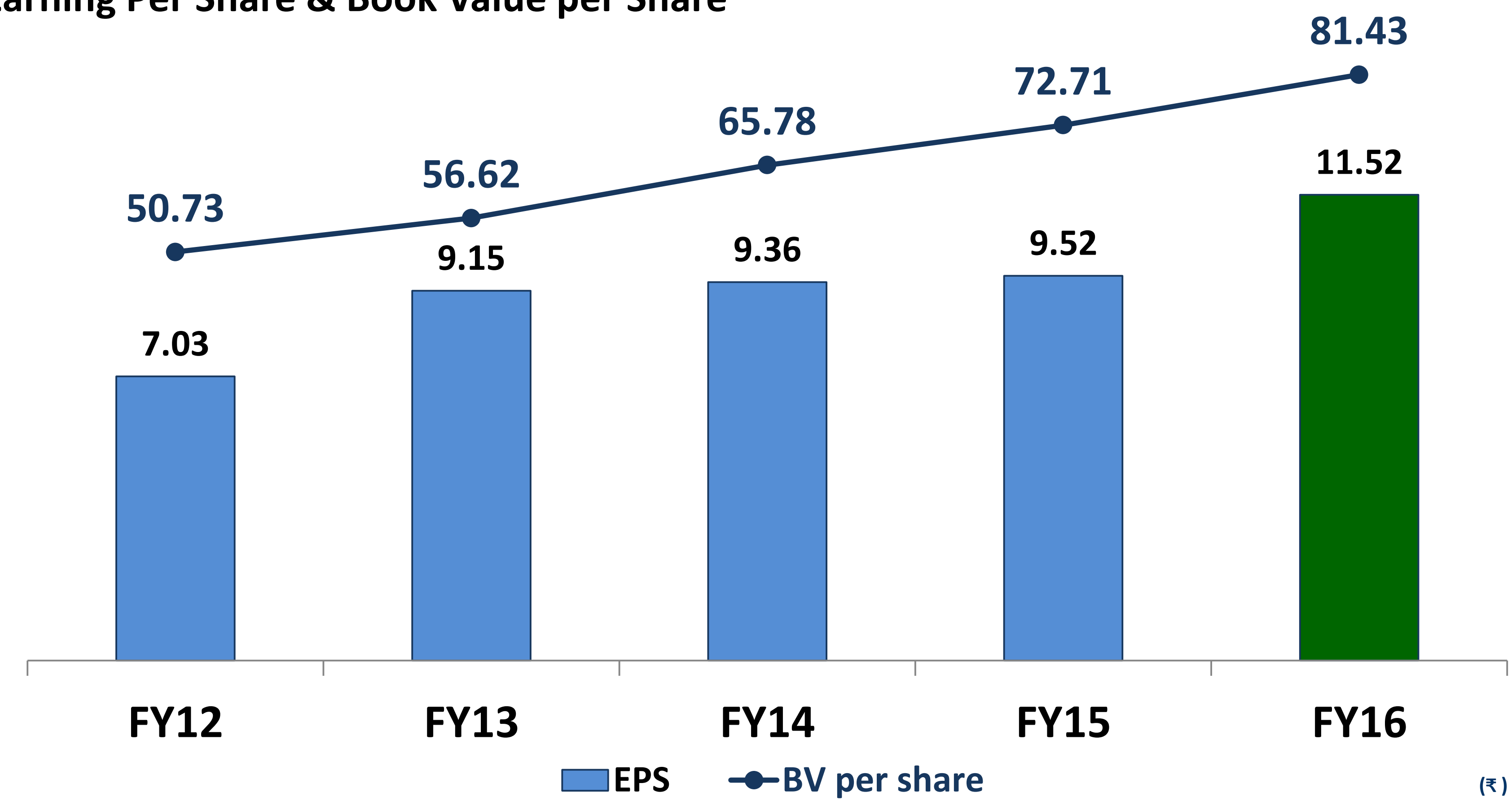


(₹ in crore)

Journey (Last 5 years): Returns to Stakeholders

…. and enhanced Shareholder returns….

Earning Per Share & Book Value per Share



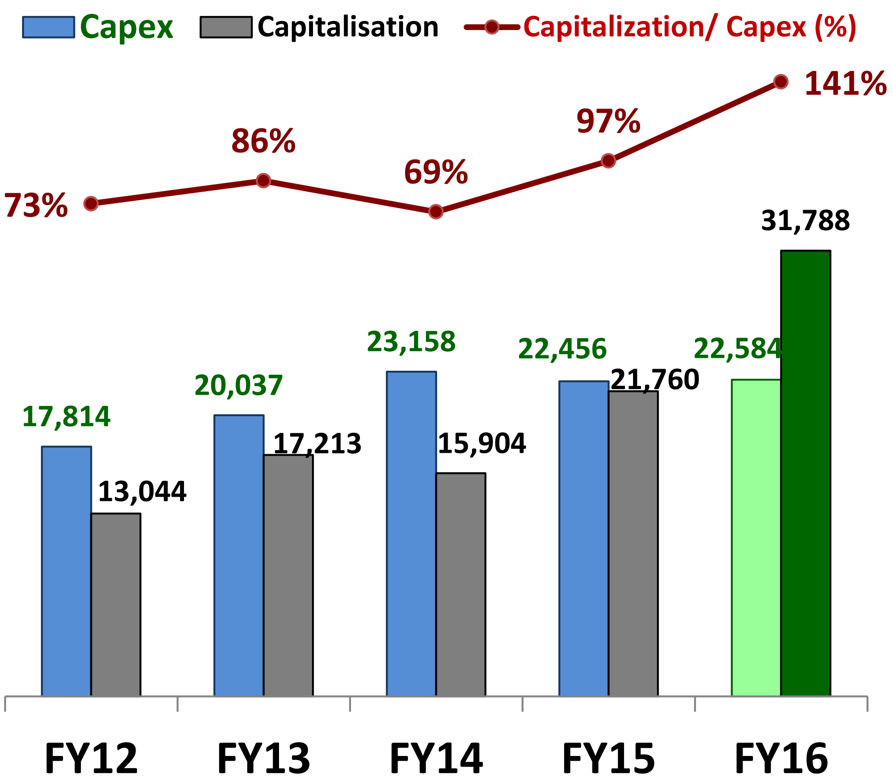
Dividend for FY16: ₹ 2.31 per share (including ₹ 1.51 proposed)

ONE Nation Grid Frequency

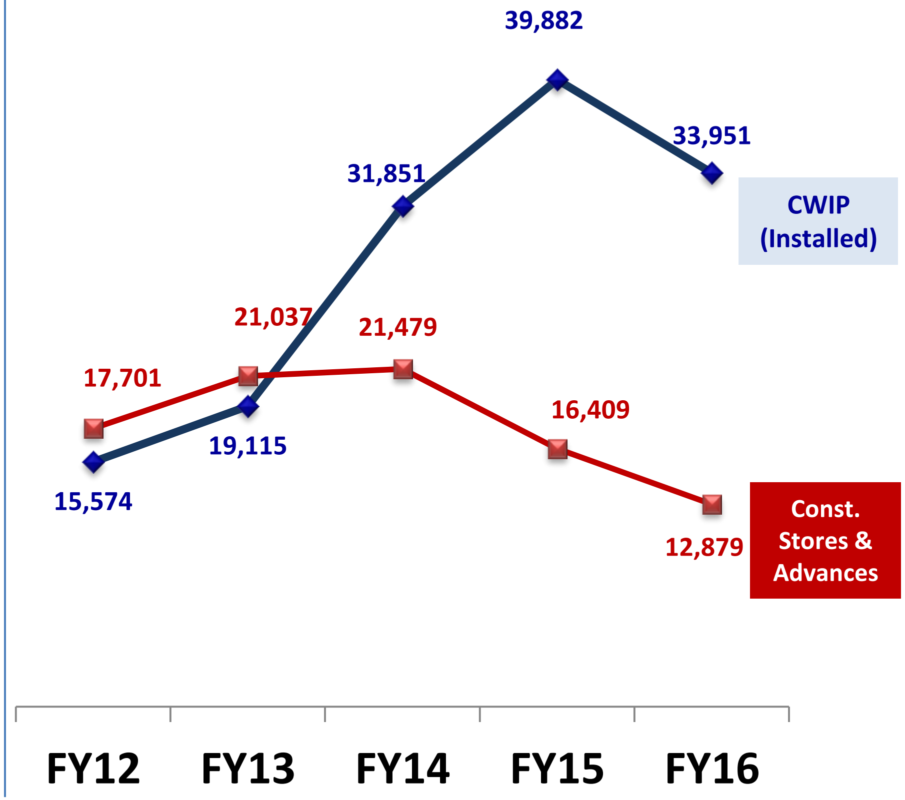
Journey (Last 5 years): Project Efficiency

Increasing Capitalization & Efficient Project Mgmt.

Thrust on Capitalization



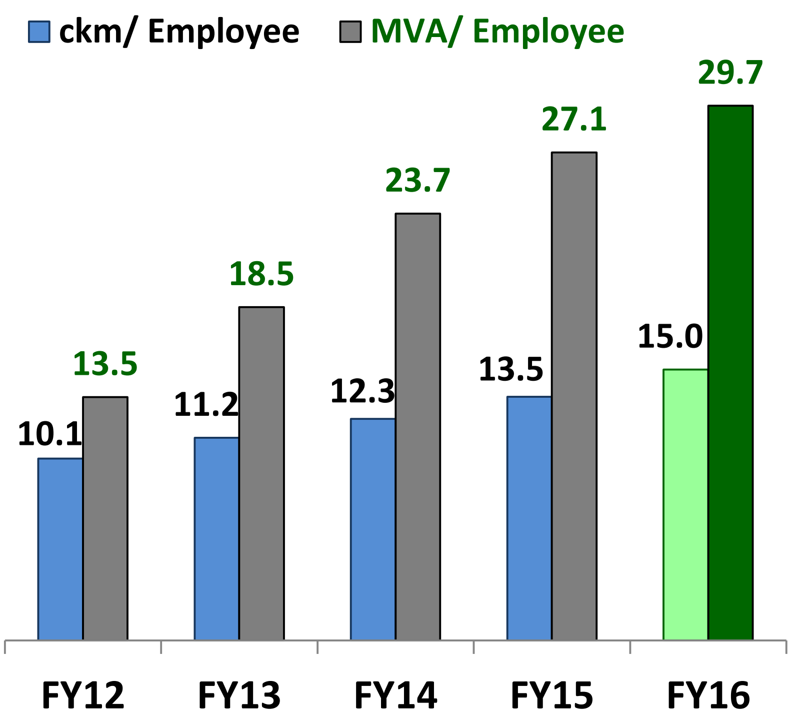
...and CWIP Management



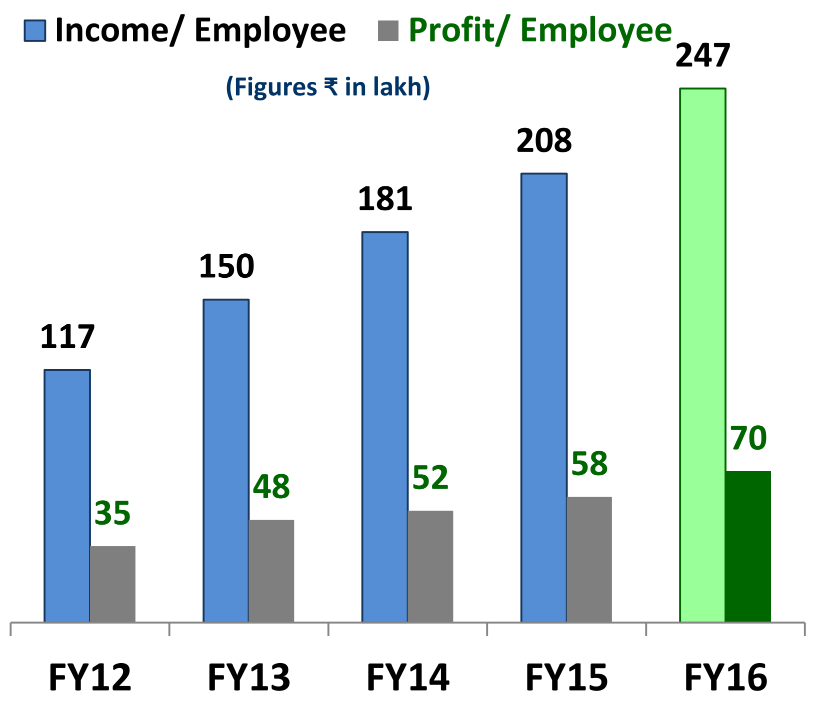
(Figures ₹ in crore)

Journey (Last 5 years): Employee Efficiency

Increased Employee Productivity….



….and Employee Efficiency



Setting new benchmarks, year after year

Performance (FY16)

–

Consultancy

Telecom

CSR & Sustainability

Performance (FY16): Consultancy - Domestic

Income (incl. Intl. Business)
₹ 465 crore (22%↑)

Orders recd.: 27 Nos.

Project Cost of Orders.: ₹ 810 crore

Major Orders

- TS for Eastern DFCI;
- IPDS Implementation
- Line & S/S for East Central Railways

Ongoing Assignments: 115; Project Cost ₹ 14,826 crore (Balance Cost)

Major assignments

- ✓ NER Power System Improvement Project (6 NE States)
- ✓ Strengthening of T&D System in Arunachal & Sikkim
- ✓ 220kV TS to Leh-Kargil (J&K)
- ✓ Evacuation System for Lalitpur TPP (UP)
- ✓ Implementation of IPDS at Old Kashi area

Performance (FY16): Consultancy- International

Footprints: 18 countries

Orders recd.: 4

Comml. Proposals submitted: 15

EOIs submitted: 19

New countries approached

Major Highlights

- ✓ New Interconnections with Nepal & Bangladesh - accomplished
- ✓ Doshi & Charikar Sub-stations & associated lines in Afganistan - completed
- ✓ Management Contract in Ethiopia - successfully completed

Major Ongoing Assignments

Ongoing Assignments: 13 Nos.

- 2^{nd} Block of 1x500MW HVDC B2B Stn. at Bheramara
- CASA-1000 Project
- Assignments from ADB & World Bank in Nepal
- Trans. Infrastructure works in Kenya

Performance (FY16): Telecom

Income: ₹ 392 crore (43%↑)	79 New Clients added [(Pvt. (42), Govt(37)]	Total Order Book > ₹ 2100 crore

- Services provided: Dedicated Leased Lines, Internet, MPLS-VPN, Dark Fiber
- Clientele: Telcos, Govt. Deptts., PSUs & Private Cos. , IT Cos.

➢ **Infrastructure:**

- **Fiber Optic Network** : ~ 36,500km (~3,300 km added in FY16)
- **Points of Presence** : 595 (233 Nos. added in FY16)
- **Backbone Availability** : 100%

➢ **Major Projects:**

- **National Knowledge Network (NKN):** Project completed & Under Operation
- **National Optic Fiber Network (NOFN):** Work for 7,175 Gram Panchayats under progress - 4,120 Gram Panchayats connected

Performance (FY16): CSR & Sustainability

पावरग्रिड

Major Thrust Areas for CSR

Rural Development | Skill Development | Education | Health | Environment

Major CSR Projects undertaken in FY16

- Construction of ~9,500 toilets in ~4,250 schools in 7 States under 'Swachh Bharat Mission' of GoI
- Skill Development to more than 2000 youth
- Installation of Hand Pumps, Borewells & Solar Street Lights in villages
- Supply of Solar lanterns to 10,000 students in villages
- Scholarships to ~ 5,500 Students
- Supply of Aids and appliances to ~ 2000 persons with disabilities

Sustainability

- 50kWp Solar PV System commissioned at POWERGRID Corporate Center, Gurgaon
- POWERGRID Regional Hq. at Bengaluru – Green Building award from HUDCO
- Solar Plants & LED lights in new S/S Control Rooms
- Rain Water Harvesting in S/S
- 3rd Sustainability Report (A+ Rating) - Released

Projects Targeted for FY17
&
Status of TBCB Projects

Projects in FY17

Transmission Lines	Sub-Stations	Inter-Regional Capacity
15,000 GW-ckm	20 Nos.	12,300 MW

Major Lines

- Gaya-Varanasi, Varanasi-Kanpur-Jhatikara
- Pachkula-Patiala; Sikar-Jaipur
- Aurangabad-Boisar; Navsari-Boisar; Kala-Kudus
- Raipur PS - Wardha(2nd line),Wardha-Aurangabad
- Dehradun-Baghpat, Roorkee-Saharanpur, Dehradun-Abdullapur
- Pasighat – Roing – Tezu - Namsai
- 800kV Champa-Kurukshetra HVDC
- Aurangabad-Padghe
- Mauda-Betul-Khandwa-Indore
- Wardha-Aurangabad (1200kV tower)
- Ranchi-Chandwa-Gaya
- Tiurnelveli-Tuticorin; Tuticorin-Salem-Madhugiri; Salem-Somnahalli; Madhugiri-Yelhanka
- Jabalpur-Orai-Aligarh
- Wardha-Nizamabad-Hyderabad
- Angul-Srikakulam;
- Dulhasti-Kishenpur-New Wanpoh
- Rajarhat-Purnea
- Singrauli-Allhabad-Kanpur; Lucknow-Kanpur
- LILOs- Pandiabil (Baripada-Mendhasal); Navi Mumbai (Lonikhand-Kalwa); NP Kunta (Kadapa-Kolar; Kadapa-Hindupur)

Sub-stations

- NP Kunta
- Salem (Dharmapuri)
- Navi Mumbai (GIS)
- Kanpur (GIS)
- Pandiabil (GIS)
- Rajarhat (GIS)
- Saharanpur
- Bagpat (GIS)
- Dehradun
- Betul (GIS)
- Chandwa (GIS)
- Vemagiri (GIS)
- Srikakulam (GIS)
- Nizamabad
- Roing
- Tezu
- Namsai
- Alipurduar HVDC
- Champa HVDC
- Kurukshetra HVDC

Initially envisaged as part of HVDC

Inter-Regional

- Gaya-Varanasi
- Champa-Kurukshetra
- Angul-Srikakulam
- Wardha-Nizamabad
- Biswanath-Chariyali - Agra Pole-II
- Alipurduar – Agra

Green font indicates assets commissioned in FY17

Status of TBCB Projects (upto Mar'16)

Participation
23 Projects

Success
9 (39%)

Cost-wise
[Annual Levelised Tr. Charges]
₹ 1643 crore (47%)

SPV & Date of Incorporation	Completion	ALTC (₹ in cr.)	Current Status
POWERGRID NM Trans. Ltd. (Mar-12)	Oct-16	99	Construction under Progress
POWERGRID Vizag Trans. Ltd. (Aug-13)	Aug-16	231	1st element commissioned in Dec-15. Construction under Progress
POWERGRID Unchahar Trans. Ltd. (Mar-14)	Sep-16	17	Construction under Progress
POWERGRID Kala Amb Trans. Ltd. (May-14)	Jul-17	59	Construction under Progress
POWERGRID Jabalpur Trans. Ltd. (Feb-15)	Jul-18	211	Construction under Progress
POWERGRID Warora Trans. Ltd. (Apr-15)	Nov-17	290	Construction under Progress
POWERGRID Parli Trans. Ltd. (Apr-15)	Jan-18	257	Construction under Progress
POWERGRID Southern I/C Trans. Ltd. (Dec-15)	Apr-19	359	Construction under Progress
POWERGRID Vemagiri Trans. Ltd. (Apr-12)	---	120	Project discontinued

[ALTC: Annual Levelised Trans. Charges]

Outlook,
Investment Programme
&
Way Forward

Power Sector Outlook

Capacity addition for Apr17-Mar22 period

- Generation initially envisaged for the period ‘Apr17 to Mar22’ (i.e. FY18-FY22)
  - 86 GW (conventional)
  - 30 GW (Renewables)
- Reworking of Generation & Trans. Plan – under process by GoI

Source: CEA/ MNRE

Power Sector Outlook (contd.)

For Renewables: Revised Target 175GW by 2022

Solar- 100 GW	Wind- 60 GW	Others- 15 GW

Solar: 100 GW

- Ultra Mega Solar Parks: 20 GW
- Rooftop: 40 GW
- Distributed: 40 GW

Solar Capacity Addn.- Year wise Targets

- Upto FY16: 6.7 GW (Actual as on 31.3.16)
- FY17: 12 GW
- FY18: 15 GW
- FY19: 16 GW
- FY20: 17 GW
- FY21& FY22: 17.5 GW each

Driving Forces: Thrust on Renewables → 24x7 Power for All → Sector Reforms like UDAY

Source: MNRE

POWERGRID Outlook (as on Apr'16)

Ongoing Projects	**approx. ₹ 94,000 crore**
New Projects	**approx. ₹ 34,000 crore**
TBCB Projects	**approx. ₹ 16,000 crore** **(as per Empowered Committee Estimate)**

Total Works in Hand: ₹ 1,44,000 crore (approx.)

Planned Investment (Apr12-Mar17)

Planned Capital Outlay*	Annual Capex Plan [*Projects: Ongoing Projects; Tariff Based Bidding Projects; Projects assigned by GoI; Green Energy Corridors; Intra-State Projects; Transnational Interconnections]				
₹110,000 crore	FY12-13: ₹20,037 cr. (Achieved)	FY13-14: ₹23,158 cr. (Achieved)	FY14-15: ₹ 22,456 cr. (Achieved)	FY15-16: ₹ 22,584 cr. (Achieved)	FY16-17: ₹22,550 cr.

More than ₹ 88,200 crore achieved in first 4 years of XII Plan

Contracts awarded

- Cumulative since Apr’12 to Mar’16: ~ ₹ 71,500 crore including
  - ✓ ~ ₹ 22,600 crore in FY16

Investments Approved

- Cumulative since Apr’12 to Mar’16: ~ ₹ 58,850 crore including
  - ✓ Projects worth ~ ₹ 13,200 crore in FY16

Way Forward

Strengthening the Core Transmission Business through

- ✓ Capital Efficiency
- ✓ Operational Efficiency
- ✓ Process Innovation

Tapping Opportunities in International Transmission Business through

- ✓ Consultancy
- ✓ EPC
- ✓ Asset Ownership (subsequently)

Increasing Telecom Business by

- ✓ Leveraging tower infrastructure
- ✓ Deploying 100G technology for future

Major Recognitions

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Fastest Growing Electric Utility in Asia for 2nd successive year

Only Indian PSU in the Platts Top50 Fastest Growing Energy Companies 2015

- *Source: Platts Top 250 Energy Company Rankings 2014 & 2015*

POWERGRID – Only Indian Company among *'One of the Best Three Asian Companies which host most constructive Analyst Days that professionals find most beneficial'*

- *Source: Institutional Investor Award: The 2015 All-Asia Best Analyst Day*

4th Largest CPSE in terms of Gross Block for 2014-15

(An improvement to previous year)

- *Source: PSE Survey for 2014-15 released by DPE, GoI*

Thank You

Presentation available at www.powergridindia.com