Confederation of Indian Industry

Industry Paper on India's Transmission Sector

Issues & Recommendations

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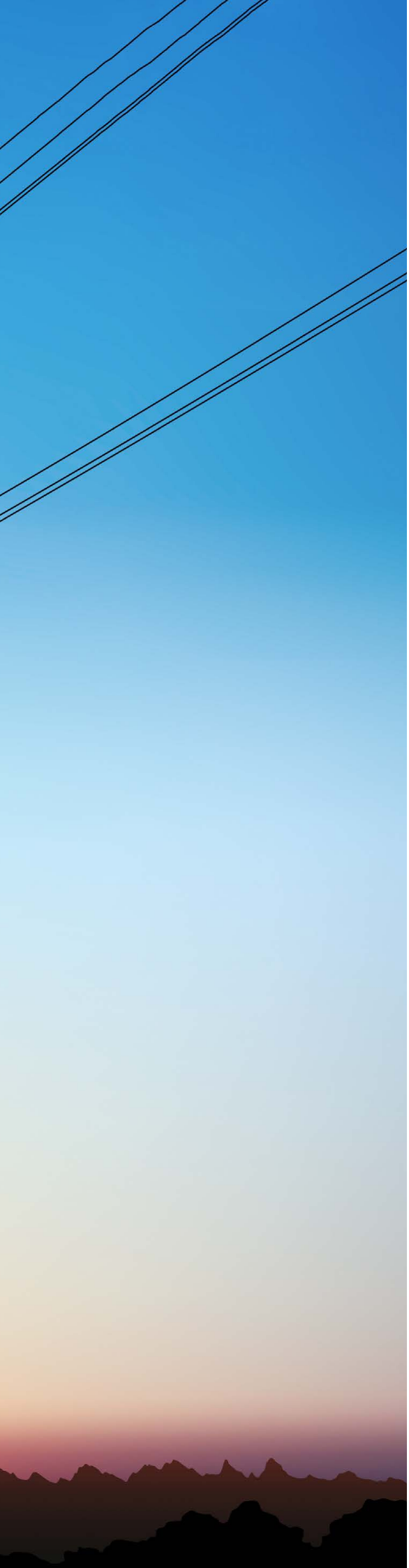

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Executive Summary

India aims to achieve 500 GW of non-fossil fuel energy capacity by 2030, with a focus on solar, wind, hydro, and nuclear power to reduce coal dependence. The goal is for renewables to generate 50% of the country's electricity, cutting carbon emissions. To support this, India is investing in large-scale projects, grid upgrades, and emerging technologies, like green hydrogen, alongside policy measures and financial incentives.

Additionally, India targets net-zero carbon emissions by 2070, balancing emissions with removals through sustainable practices and carbon capture. This commitment, announced at COP26, involves expanding electric mobility, enhancing energy efficiency, and fostering international collaboration for a low-carbon economy.

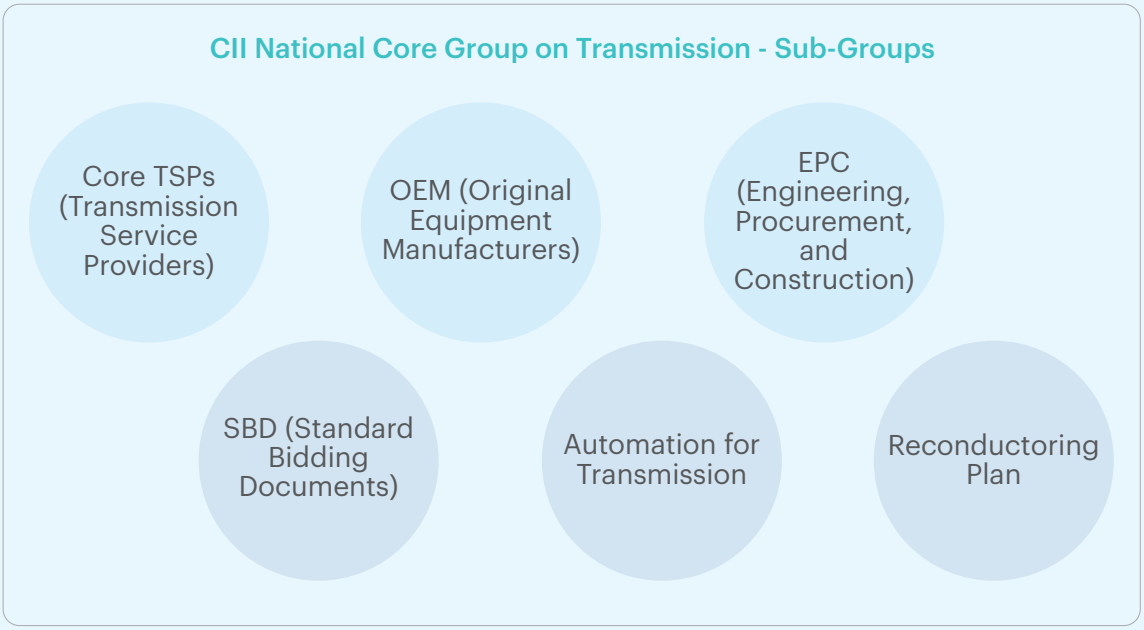
The CII National Committee on Power, chaired by Mr. Anil Sardana, Chairman, CII National Committee and Managing Director, Adani Power, and co-chaired by Mr. Rajiv Ranjan Mishra, Managing Director, Apraava Energy, plays an important role in shaping India's power sector policy and regulatory landscape. The Committee aims to facilitate engagement between the industry and the government to address key challenges in power generation, transmission, and distribution.

The Committee focuses on promoting investments in the power sector, ensuring financial viability of DISCOMs, and advocating for reforms that enhance efficiency and sustainability. It works towards improving grid infrastructure, integrating renewable energy sources, and facilitating competitive energy markets with a robust regulatory framework. Additionally, the Committee supports initiatives aligned with India's goal of achieving 500 GW of non-fossil fuel capacity by 2030 and strengthening energy security through technological advancements and policy interventions.

Under the CII National Committee on Power, a dedicated CII National Core Group on Transmission has been established to address critical issues in the power transmission sector. This core group is chaired by Mr. Arun Sharma, CEO, Sterlite Power, and plays a key role in shaping policies and strategies to enhance India's transmission infrastructure.

The Core Group on Transmission examined issues related to grid expansion, Right of Way (RoW), land acquisition, regulatory bottlenecks, and integration of renewable energy into the network. Strengthening the transmission sector is crucial to ensuring reliability, efficiency, and scalability of India's power supply, particularly as the country moves towards its 500 GW non-fossil fuel capacity target by 2030. By working closely with policymakers and industry stakeholders, the core group aims to accelerate investments, streamline approvals, and facilitate the development of a resilient and future-ready transmission network.

Under the CII National Core Group on Transmission, the following sub-groups have been established to focus on key aspects of the transmission sector:



These sub-groups have analysed the challenges in their respective areas and recommended measures to enhance efficiency and enable growth.

Introduction

The transmission system is fundamental to the power sector, providing a vital link between electricity generation units and the distribution infrastructure. Ensuring efficient and reliable flow of power from generation centres to consumption centres requires efficient and high-capacity network of inter and intra state transmission lines.

India's energy resources are unevenly distributed with coal reserves in the central and eastern regions of the country, while hydroelectric potential is primarily concentrated in the Himalayan belt, encompassing the northern and north-eastern states. This means that pit head coal power plants and hydroelectric generation units are not widely spread out, geographically, across the country, though imported coal-based and natural gas power plants are in coastal states.

Similarly, renewable energy resources such as wind and solar are largely concentrated in states including Tamil Nadu, Andhra Pradesh, Karnataka, Rajasthan, Maharashtra, and Gujarat. In contrast, the major load centres, characterized by high electricity demand, are situated in the central part of the country. This geographical disparity necessitates a robust and efficient transmission network to facilitate optimal resource utilization and balanced power supply across regions.

The Indian transmission system has expanded significantly over the years to evacuate power from generating stations to load centres. The transmission system in the country has been continuously strengthened with addition of transmission lines and inter-regional capacity.[1]

Following is the Union Ministry of Power's data on addition in transmission lines and in transformation capacity since FY 2014-15:

Year	Addition in Transmission line (ckm)	Addition in Transformation capacity (MVA)
FY 2014-15	22,101	65,554
FY 2015-16	28,114	62,849
FY 2016-17	26,300	81,816
FY 2017-18	23,119	86,193
FY 2018-19	22,437	72,705
FY 2019-20	11,664	68,230
FY 2020-21	16,750	57,575
FY 2021-22	14,895	78,982
FY 2022-23	14,625	75,902
FY 2023-24	14,203	70,728
FY 2024-25*	391	6,225
Total	**194,599**	**7,26,759**

*as per data available on the website of Ministry of Power on 11.04.2025.
Source: Ministry of Power, Government of India.

India is aiming to increase its power transmission capacity to 650,000 circuit km by FY32, focusing on integrating renewable energy and securing 24x7 power supply. The country plans phased additions, targeting 114,000 circuit km by FY27 and 76,787 circuit km between FY27 and FY32. According to the Union power ministry, the country's transmission capacity was about 480,000 circuit km of transmission lines as on 14 October 2024.

[1] Overview | Government of India | Ministry of Power

About the Paper

Despite significant advancements in transmission infrastructure, operational challenges have continued to persist. However, there are several regulatory bottlenecks, price fluctuations affecting financial planning, compensation uncertainties, lack of standardisation in the sector and cybersecurity risks among others, that need to be addressed for a vibrant transmission sector. Transmission systems also need to integrate green energy, adopt energy storage, and address issues relating to insufficient AI/ML utilization.

This report provides detailed analysis of the key issues facing the sector and suggests reforms that will help ease the bottlenecks in transmission in India, thereby furthering the objective of 'One Nation-One Grid- One Frequency' which will enable seamless power transfer across India. It also outlines measures that can enhance efficiency, help improve project execution and mitigate financial risks in the transmission sector.

Key Issues & Recommendations

Reliability in Grid Infrastructure and Grid Expansion Through Standardization

To improve reliability of grid infrastructure for transmission and for expansion of grid infrastructure, the following things need to be addressed:

Uniform Grid Infrastructure: The state government's procurement processes should align with that of the Central Electricity Authority's standardised specifications to ensure uniform grid standards across the country. This standardization will play a critical role in streamlining design, manufacturing, and procurement processes for transmission equipment, while also facilitating interoperability between systems. However, standardization has largely been implemented at higher voltage levels, with a notable gap at the lower voltage levels, particularly at 220 kV and 132 kV levels in intra-state transmission projects. The absence of uniform standards at these voltage levels leads to significant inefficiencies, including the need for customised designs and equipment across different states. This fragmentation has increased project costs, timelines and imposed additional operational and logistical burdens on Original Equipment Manufacturers (OEMs), who must cater to a wide array of specifications. Such variability hampers economies of scale, reduces manufacturing efficiency, and

constrains market competition. Therefore, to ensure consistency, efficiency, and competitiveness in the power transmission sector establishing uniform standards at all voltage levels, including the lower ones, is important for ensuring cost-effective and scalable development of the transmission network. This would also help uphold the "One Nation, One Grid" principle, and facilitate scalability for manufacturers and remove limitations on buyer choices.

Manufacturing Transformers: To enhance the availability and affordability of CRGO steel for transformer manufacturing in India it is recommended that the Bureau of Indian Standards (BIS) Quality Control Order (QCO) on Cold Rolled Grain Oriented (CRGO) Steel be removed. The existing certification process is often slow and cumbersome, which has created barriers to the timely supply of CRGO steel, a critical material in transformer production. By removing the QCO, the regulatory burden on both domestic and international manufacturers will be significantly reduced, encouraging global suppliers to enter the Indian market. This policy change will stimulate competition, lower prices, and improve the overall supply chain, ultimately facilitating the growth of the transformer manufacturing industry. Additionally, increased access to CRGO steel will support India's energy infrastructure development, ensuring the timely production and delivery of transformers required for the country's expanding power sector.

Standardizing VSC Project Ratings: Voltage Source Converters (VSC) are devices used in high-voltage direct current (HVDC) systems for power transmission. They help convert alternating current (AC) into direct current (DC) and vice versa, and are key components in modern power grids, especially for long-distance transmission and integrating renewable energy. Standardizing VSC project ratings would help ensure uniform technical specifications and performance criteria for these converters across all upcoming projects. If this is done, all new VSC-based projects will follow the same design and operational standards. This in turn, will help ensure consistency across different projects. It would also lead to easier procurement and production of components, as manufacturers would be able to focus on making equipment that meets the same specifications. Setting standardized specifications, would also make it easier to source the required equipment locally, as manufacturers will be able to produce components in bulk to meet these uniform specifications. It will help create a predictable and stable market, which encourages investment. If investors are assured that the specifications will remain consistent across projects, it will automatically reduce uncertainty and make it easier for both domestic and international companies to participate in the market.

Integration of Renewable Energy in Transmission

Discussions around transmission need to address challenges and strategies for green energy integration into the grid, while balancing the load. In this regard, the following points need attention:

Green Energy Integration Strategies: It is technically challenging to address load balancing while integrating solar and wind power into the grid. Implementing advanced automation solutions to optimize load balancing needs, must be developed strategically. These will be crucial when integrating renewable energy sources into the grid. AI/ML in new transmission lines can aid in optimizing capacity utilization, help avoid pilferages and provide effective energy flow mapping.

Enhance Integration of Battery Energy Storage Systems (BESS): Promote the use of BESS to ensure uninterrupted power supply to ensure round-the-clock power supply, especially, as the grid accommodates more green energy.

Automation of Transmission

Automation will help optimize grid efficiency, this would require integrating smart technologies, digital monitoring, and automation solutions. In this regard, the following needs to be addressed:

Lack of Artificial Intelligence and Machine Learning in Transmission: New and old transmission/distribution lines do not have Artificial Intelligence (AI) or Machine Learning (ML) inbuilt in them, this results in suboptimal capacity utilization, pilferages, and ineffective energy flow mapping. Implementing AI/ML in transmission systems will help counter this. Incorporation of AI and machine learning for all new transmission/distribution lines and retrofitting old lines to optimize capacity utilization and energy flow mapping must be mandated.

Automation in Turnkey Projects: Bidding for automation packages are currently done separately rather than being a part of turnkey projects, causing integration issues, quality inconsistencies, and execution delays. Automation must be included in turnkey projects, to ensure that, automation packages are an integral part of turnkey projects rather than being bid separately. This will help avoid integration challenges and execution delays.

Automating Settled CRC Cases: This will help prevent unnecessary delays and additional costs. At present settled cases still face administrative delays, leading to increased costs.

Automating Power Sector Clearances: The power sector clearances must be automated, to reduce delays and improve ease of business by creating a platform to ensure timely action and avoid project disruptions.

Regulatory Bottlenecks in Transmission

Issues around regulatory overlaps, compensation uncertainties, and inadequate contractual risk mitigation need to be addressed. These issues require streamlined approvals, standardized compensation mechanisms, and stronger contractual safeguards in Transmission Service Agreements (TSAs). Following are the suggestions:

Clarity in Sections 68 and 164 of the Electricity Act: This clarification is required for removing duplicative approval processes and regulatory uncertainty for transmission licensees and generating companies. The confusion over when Section 68 approval is needed, alongside

authorization requirement under Section 164, that enforces provisions of the Telegraph Act, creates hurdles. This uncertainty leads to project delays, increased costs, and inefficiencies in execution. It would be helpful to clearly define the interplay between Section 68 and Section 164 to eliminate redundant approvals and streamline the clearance process by establishing clear guidelines on which approval is required under different circumstances, project developers can avoid unnecessary delays and ensure smoother regulatory compliance.

Reconductoring Framework by Central Electricity Authority: The Central Electricity Authority (CEA) has not yet provided a framework for reconductoring. There is an absence of a long-term (5–10 year) planning approach, from a manufacturer's perspective. CEA should provide regulatory framework and mandate a study on reconductoring to provide necessary guidelines, introduce clear policies and standards for insulated cross arms and other key components. The government may consider identifying and appointing a dedicated agency to conduct the reconductoring study and oversee its execution. Developing a National Reconductoring Plan to upgrade transmission infrastructure efficiently which can focus on needs to maximize power flow through existing infrastructure rather than new line development is proposed.

Empower CTU: Every Change in law claim goes through a dispute resolution process wherein the TSP is compelled to file a petition in the CERC under Article 16 of the TSA to get the required relief. This process is detrimental to the overall health of the sector as TSP is unable to get any declaratory relief ab initio due to the occurrence of a CIL/FM event. Due to this, the TSP must fund the shortfall on account of cost overrun through equity or other expensive fund sources. Absence of any mechanism for mutual settlement also leads to regulatory uncertainty as is prevalent in other sectors. This can be addressed through Introduction of framework of settled judicial precedents to enable CTU to process CIL claims faster and empower CTU through capacity building, necessary TSA amendments to enable resolution through amicable settlements. Thus it would be helpful to empower CTU and promote bilateral decision making by CTU to avoid prolonged litigation at CERC.

Inclusion of Critical Documents in Request for Proposals: The absence of critical technical documents in Requests for Proposals (RFPs) affects project planning. It is therefore required that, a justification letter advocating for the inclusion of PSTC (power transmission coordination) files in RFPs should be submitted to power finance companies.

Inclusion of Price Variation Clauses in Contracts: Transmission loss capitalization is not included in tender documents, leading to financial losses.

Also, price variation, driven by fluctuating commodity prices affects project costs and financial planning. It would be helpful to introduce price variation clauses in contracts and align project pricing with market indexes to mitigate the impact of price fluctuations.

Standardised Guidelines and Norms for Equipment Types and Validity Period: This will reduce unnecessary retesting burdens and, also increase competitiveness among manufacturers while improving cost efficiency for end-users. In this regard, the limited validity period of Short Circuit Tests, mandated at 5-10 years were discussed. This results in increased equipment costs, congestion at test facilities, and a reduced number of qualified suppliers in the market. Besides, there are varying specifications from state entities and renewable developers.

Financial Challenges for Transmission

Lack of financing and bottlenecks in accessing funding significantly impact the transmission sector. The following points need attention:

Expand Scope for Private Sector Participation: There is need to attract private investment and expertise in the transmission sector. State TBCB (Tariff-Based Competitive Bidding) tenders should encourage private sector participation and technology adoption. At present, its scope remains limited.

Protection against Changing Laws During Ongoing Contract Period: Changing laws during the contract period impacts project costs. Economic restitution measures need to be implemented for projects affected by changing laws during the contract period.

Clarity on Cost Variability: Unclear cost variability leads to inefficiencies in the bidding process. Standardize fixed costs (e.g., equipment) while allowing bidding on variable costs, like RoW expenses, to improve clarity and efficiency. Financial planning and budget allocation for transmission should be well laid out. Budget allocation for reconductoring initiatives should be spelt out and should be included in transmission loss capitalization in tenders, to prevent recurring financial losses.

Implement Insurance Surety Bonds: The absence of insurance surety bonds is leading to financial risks for developers and EPC companies, as working capital is tied up. There is a need to implement insurance surety bonds in transmission projects to ease financial constraints. Performance Bank guarantees (PBGs) impose high costs on equipment manufacturers, locking up capital and increasing overall project costs. The power sector should actively implement Surety Bid Bonds to replace PBGs, freeing up capital, reducing financial burden on manufacturers, and increasing liquidity for industry growth.

Separate Contractual Mechanism for Cost Overruns Related to RoW: The existing Transmission Service Agreement (TSA) does not provide a separate contractual mechanism for passing through cost overruns related to RoW compensation. Transmission projects frequently face unforeseen delays and cost escalations due to RoW disputes and land acquisition challenges. Without clear Force Majeure provisions, developers will continue to bear the financial burden of these delays, making investments in transmission infrastructure riskier. It is important to introduce a contractual mechanism in TSA to pass through RoW cost overruns and recognize RoW related time delays as Force Majeure events. This will provide financial relief to developers by ensuring that RoW-related disruptions are accounted for within the project's risk-sharing framework. Force Majeure provisions in standard bidding documents (SBDs) thus needs to be addressed.

Policy Suggestions for Transmission

To ensure a robust and scalable transmission network through policy interventions the following suggestions were made:

Policy for Addressing Supply Chain Issues in HVDC: Considering the geo-political situation, removing land border restrictions on immediate basis and fostering collaboration between Indian manufacturers and existing technology providers will enhance competitive bidding and technology transfer. This aside, reviewing Minimum Local Content (MLC) requirements, will motivate the OEMs to accelerate localisation and over time meet the target levels. Issues also arise in supply chain because of choice of technology as most of these are based on LCC technology even though VSC is a more modern state of the art technology. The supply chain is also constricted as supply of critical HVDC components is restricted to only three OEMs namely GE and Hitachi Energy for LCC and, Siemens for VSC technology. Long lead times for essential equipment, such as transformers, reactors, and GIS, due to OEM capacity constraints, are delaying project timelines. Solutions like, relaxing import restrictions on critical materials or adjusting project timelines to accommodate these delays maybe explored. An exemption from the restrictions imposed by Order (Public Procurement No. 4), "Restrictions under Rule 144 (xi) of the General Financial Rules (GFRs), 2017," dated 23rd February 2023, to companies belonging to countries sharing land border with India but have set manufacturing facilities within India will facilitate the supply chain. Also, allowing imports of 765 kV class transformers and reactors selectively for transmission projects with stringent project timelines (such as 24 months) can be facilitated to meet the requirements of timely evacuation of power.

Dedicated RoW Framework: The Bid Process Coordinator (BPC) should provide uniform baseline RoW compensation estimates, using state government notifications or historical data to reduce bidder uncertainty. Establishing a standardized compensation framework will ensure fair compensation to landowners while providing financial clarity for developers. A dedicated RoW framework under the Electricity Act should be established, removing dependency on the Telegraph Act to ensure a comprehensive compensation and approval process. This framework should provide clarity on compensation standards, streamline approvals, and reduce project execution delays.

High-intensity transmission corridors: Such corridors using advanced HTLS (High- Temperature Low Sag) conductors should be planned, as these corridors can transmit more power per meter of RoW, reducing the number of

transmission lines needed and their environmental impact. Planning these HTLS corridors can thus help make the national transmission system future ready.

A Clear Time-bound Framework for FRA compliance: According to Ministry of Environment Forest & Climate Change guidelines, dated 03.08.2009, 2.12.2018 and 28.02.2019, FRA certificate was required only before Stage-II forest clearance, allowing projects to commence work with Stage-I approval. However, under Van (Samrakshan Evam Samvardhan) Rules, 2023 this procedure was modified and working permission has now been made contingent upon FRA compliance, requiring its completion before starting construction. This requirement has created a significant bottleneck as FRA certificate requires multiple administrative layers such as District Collector verification, Gram Sabha consent and coordination with revenue and forest departments to resolve land ownership disputes. This leads to extension of timelines leading to cost overruns and delays in critical power transmission projects.

To avoid these delays, it is important to delink FRA certificate from working permission and aligning it with Stage-II clearance or with project charging. A clear time-bound framework for FRA compliance with defined timelines and monitoring mechanism for FRA would allow developers to begin work with Stage-I clearance and ensure that rights of forest dwelling communities remain protected while keeping infrastructure development on track.

Streamlining Forest and Environmental Clearance: Compensatory Afforestation (CA) is a statutory requirement under the Forest (Conservation) Act, 1980 which mandates that any forest land diverted for non-forest use must be compensated by afforestation on an equivalent non-forest or degraded forest land (DFL). This ensures that there is no net loss of forest cover. However, many states lack sufficient DFL leading to project delays in obtaining forest clearance. Clause 14 of Van Adhiniyam, 2023 introduced the provision of Land Banks aimed at creating a dedicated pool of land for compensatory afforestation but compensatory afforestation continues to be a challenge. It would, therefore, be useful if state governments are proactive in identifying and reserve degraded forest land for CA. Streamlined allocation and automatic approvals would help avoid delays. States must be incentivized to expand the availability of degraded land through afforestation and restoration programs, ensuring a sustainable pool of land for future projects.

Policy for Collaboration between Vocational Institutions and Power Sector Skill Council: The shortage of both skilled and unskilled labour, particularly in technical areas, is affecting project execution and progress. Vocational institutions and the Power Sector Skill Council can collaborate to establish training programs, incentivize industry participation, and support upskilling efforts for a sustainable workforce.

Conclusion

Addressing issues in the transmission sector broadly require streamlining certification processes and approvals, standardized procurement specifications and compensation mechanisms, stronger contractual safeguards in Transmission Service Agreements (TSAs), extending test validity periods, enforcing security regulations, adopting surety bid bonds, and promoting localization through structured policies. These measures will enhance project efficiency, reduce delays, improve financial predictability while strengthening transmission infrastructure development. Grid efficiency through modernization of transmission infrastructure will also improve energy reliability, and add to the overall industry competitiveness, by reducing costs. These measures will help build a reliable, efficient, and sustainable transmission system, integrating renewable energy, while supporting economic growth and security in the power sector.

Acknowledgement

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Notes

Confederation of Indian Industry

The Confederation of Indian Industry (CII) works to create and sustain an environment conducive to the development of India, partnering Industry, Government and civil society through advisory and consultative processes.

CII is a non-government, not-for-profit, industry-led and industry-managed organisation, with around 9,700 members from the private as well as public sectors, including SMEs and MNCs, and an indirect membership of over 365,000 enterprises from 318 national and regional sectoral industry bodies.

For more 130 years, CII has been engaged in shaping India's development journey and works proactively on transforming Indian Industry's engagement in national development. CII charts change by working closely with the Government on policy issues, interfacing with thought leaders, and enhancing efficiency, competitiveness, and business opportunities for industry through a range of specialised services and strategic global linkages. It also provides a platform for consensus-building and networking on key issues.

Through its dedicated Centres of Excellence and Industry competitiveness initiatives, promotion of innovation and technology adoption, and partnerships for sustainability, CII plays a transformative part in shaping the future of the nation. Extending its agenda beyond business, CII assists industry to identify and execute corporate citizenship programmes across diverse domains, including affirmative action, livelihoods, diversity management, skill development, empowerment of women, and sustainable development, to name a few.

For 2025-26, CII has identified "Accelerating Competitiveness: Globalisation, Inclusivity, Sustainability, Trust" as its theme, prioritising five key pillars. During the year, CII will align its initiatives to drive strategic action aimed at enhancing India's competitiveness by promoting global engagement, inclusive growth, sustainable practices, and a foundation of trust.

With 70 offices, including 12 Centres of Excellence, in India, and 9 overseas offices in Australia, Egypt, Germany, Indonesia, Singapore, UAE, UK, and USA, as well as institutional partnerships with about 250 counterpart organisations in almost 100 countries, CII serves as a reference point for Indian industry and the international business community.

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