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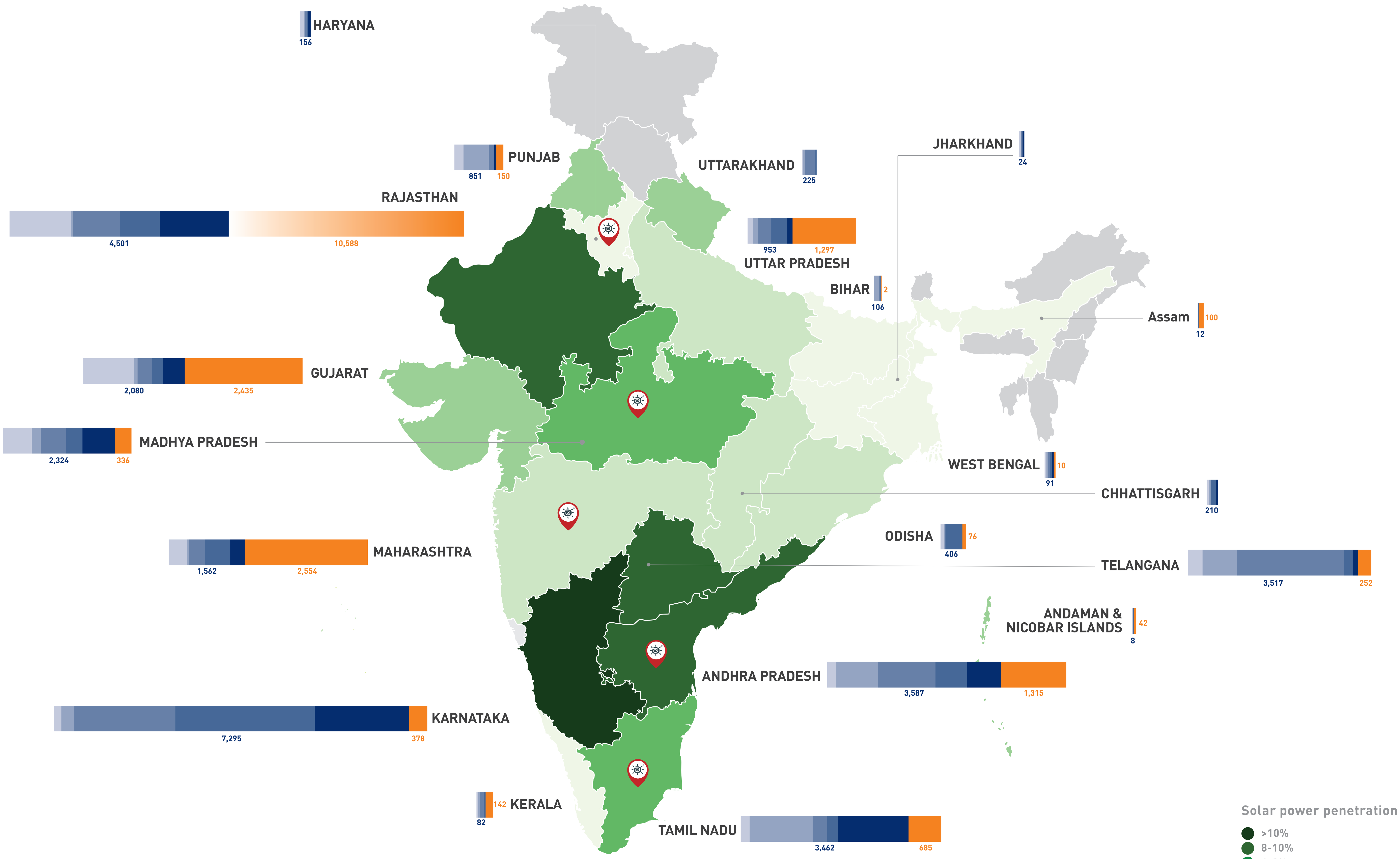
INDIA SOLAR MAP 2019 DEC

Total utility scale solar capacity as on 31 December, 2019[1,2]

Commissioned capacity 30,982 MW

Pipeline capacity 20,220 MW



Solar power penetration
- >10%
- 8-10%
- 6-8%
- 4-6%
- 2-4%
- 1-2%

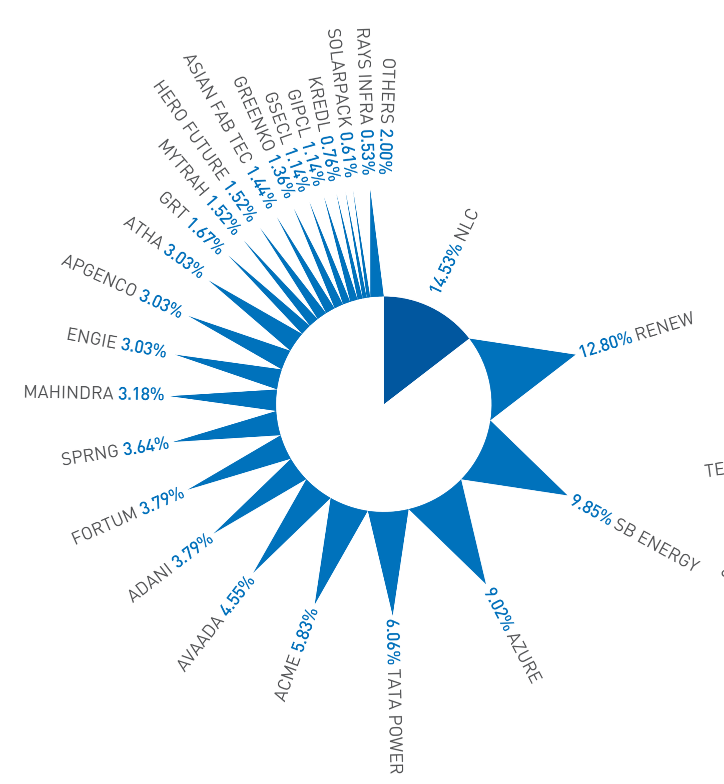
Projects commissioned by Cleantech Solar in 2019

Leading players[1]

(Projects commissioned in 2019: 7,150 MW)

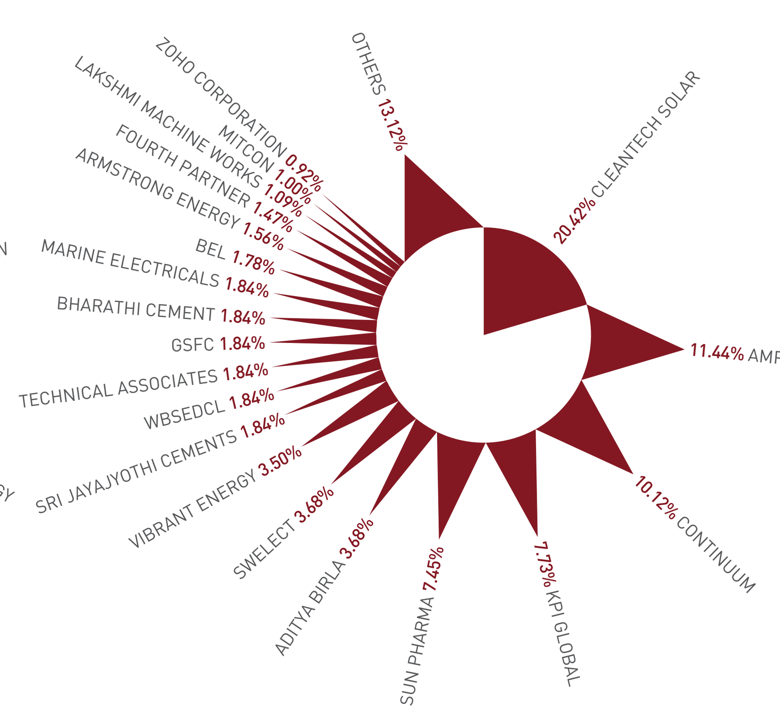
Project developers - utility scale projects

(Total capacity - 6,606 MW)



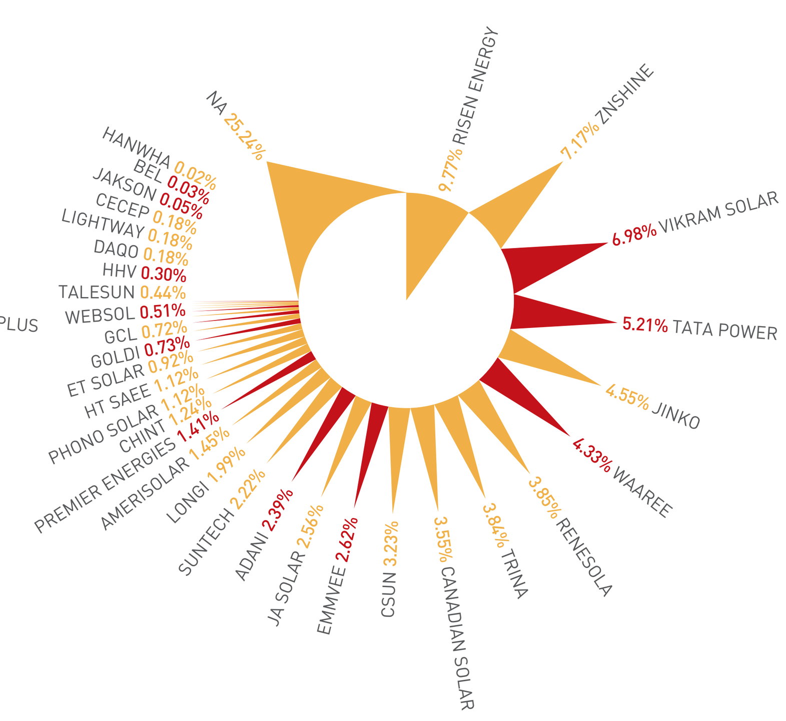
Project developers - C&I offtake projects

(Total capacity - 544 MW)



Module suppliers

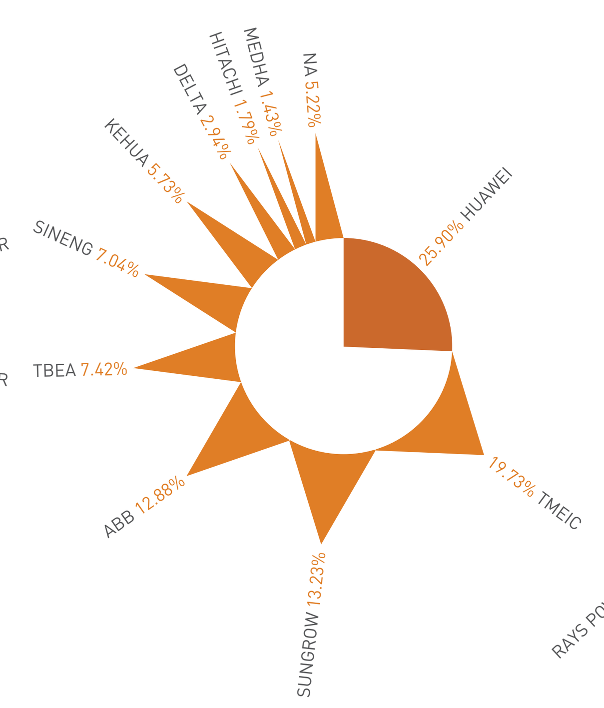
(estimated DC capacity - 9,809 MW)



Domestic manufacturers

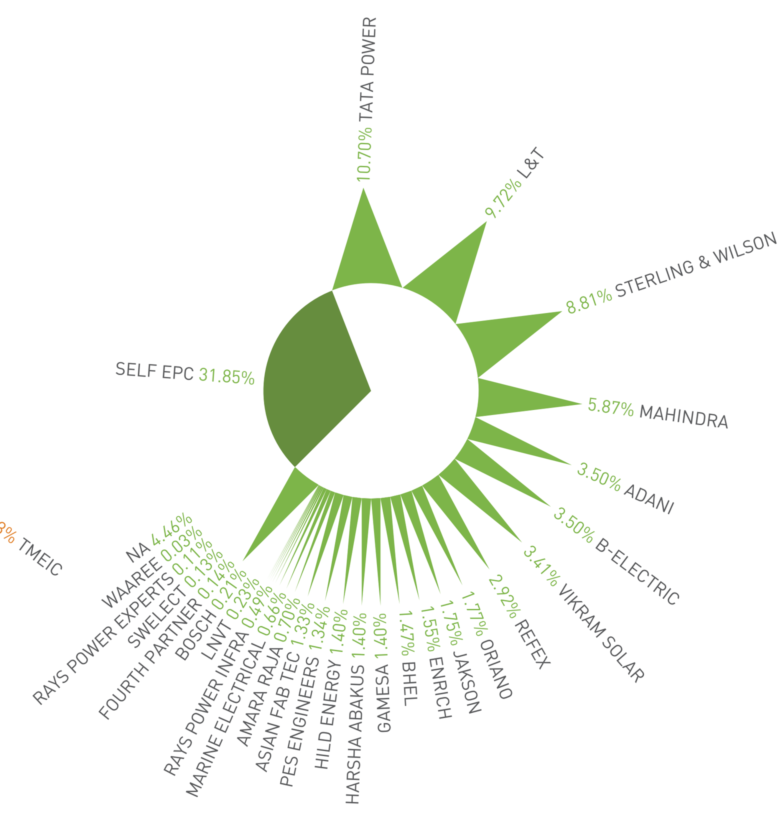
Inverter suppliers

(AC capacity - 6,978 MW)



EPC contractors

(AC capacity - 7,150 MW)



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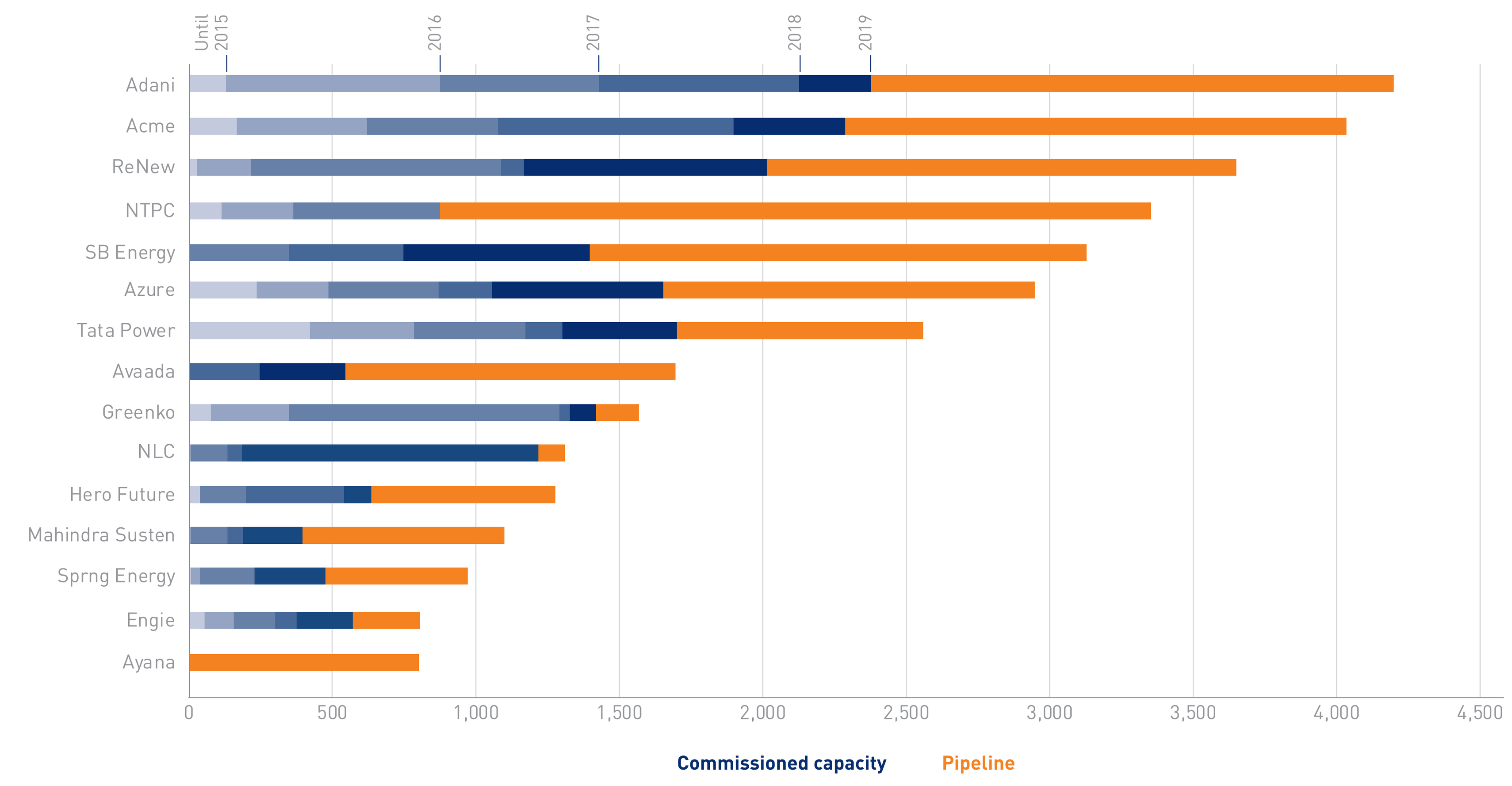
Associate sponsor: Growatt

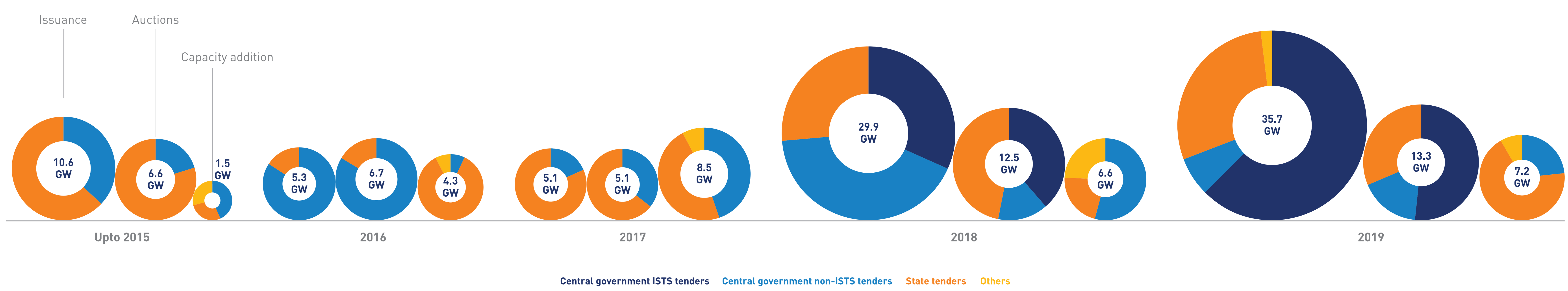
Top 10 players
(projects commissioned in 2019)

	Project developers			Module suppliers			Inverter suppliers			EPC contractors		
Current rank	Company	Previous rank	Increase/ Decrease	Company	Previous rank	Increase/ Decrease	Company	Previous rank	Increase/ Decrease	Company	Previous year rank	Increase/ Decrease
1	NLC	-	^	Risen Energy	1	<>	Huawei	5	^	Tata Power	3	^
2	ReNew	6	^	Znshine	6	^	TMEIC	4	^	L&T	2	<>
3	SB Energy	5	^	Vikram Solar	2	v	Sungrow	2	v	Sterling & Wilson	1	v
4	Azure Power	2	v	Tata Power	-	^	ABB	1	v	Mahindra Susten	5	^
5	Tata Power	9	^	Jinko	-	^	TBEA	3	v	Adani Infra	-	^
6	Acme	1	v	Waaree	9	v	Sineng	-	^	B-Electric	-	^
7	Avaada	7	<>	Renesola	5	v	Kehua	-	^	Vikram Solar	4	v
8	Adani	-	^	Trina	8	^	Delta	7	v	Refex Energy	-	^
9	Fortum	-	^	Canadian Solar	-	^	Hitachi	6	v	Oriano	-	^
10	Sprng Energy	10	<>	Csun	-	^	Medha	-	^	Jakson	7	v

Leading developers



Tender issuance, successful auctions and capacity addition[3]



Notes

1. **Methodology**
   a. BRIDGE TO INDIA has conducted an extensive data collection exercise and relied on multiple market sources including MNRE, CEA, state nodal agencies, project developers and equipment suppliers to provide accurate, factual information as far as possible. Some suppliers were either unreachable or did not validate the data available with us. All data has been cross-referenced, where possible. However, we do not guarantee completeness or accuracy of any information.
   b. Only grid connected projects above 5 MW (AC) have been considered in this report.
   c. Market shares for all players are given on the basis of capacity commissioned in the year.
   d. Pipeline includes projects that have been allocated to developers but not yet commissioned. It also includes projects where the power purchase agreement may not have been signed and/ or tariff may not have been approved by the regulators.
   e. For solar-wind hybrid tenders, we have estimated solar capacity based on tender specifications and prevalent market norms.
   f. All capacity numbers are specified in AC MW. For module supplier market share analysis, we have used DC capacity, where available, and increased AC capacity by 50% in other cases.
   g. In many projects, the EPC contractor role is split between multiple parties. We have used several criteria including final responsibility for commissioning and value of contracts for determining credits.
   h. Self-EPC denotes EPC services rendered in-house by developers or their affiliates, who are not engaged in providing EPC services to third party clients.
2. Location data is not available for 1,044 MW of ISTS projects in pipeline.
3. Cancelled tender capacity is excluded from these charts. For solar-wind hybrid tenders, full capacity has been considered.
4. Data is shown only for successful auctions.
5. **Acronyms used:**
   a. GIPCL – Gujarat Industries Power Company Limited
   b. GSECL – Gujarat State Electricity Corporation Limited
   c. ISTS – Interstate Transmission System
   b. SECI – Solar Energy Corporation of India Limited
   e. SCCL – The Singareni Collieries Company Limited
   c. WBSEDCL – West Bengal State Electricity Distribution Company Limited
6. **Sponsors**
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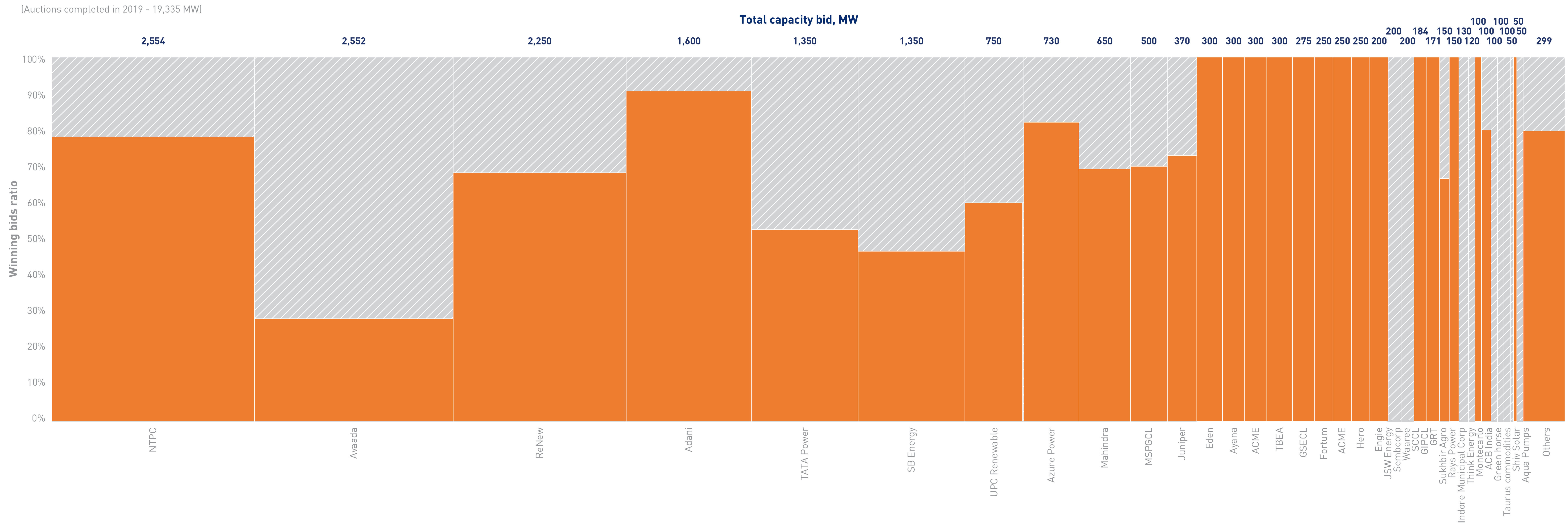
Capacity bid by individual developers[4]

(Auctions completed in 2019 - 19,335 MW)



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