



INVESTOR PRESENTATION

FINANCIAL YEAR 20-21 : December 2020



Presentation Outline

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NHPC Today

Financial Highlights

Financial Ratios

Other Business Initiatives

Projects At Glance



Our Vision: To be a global leading organization for sustainable development of clean power through competent, responsible and innovative values.



Subansiri Lower Project



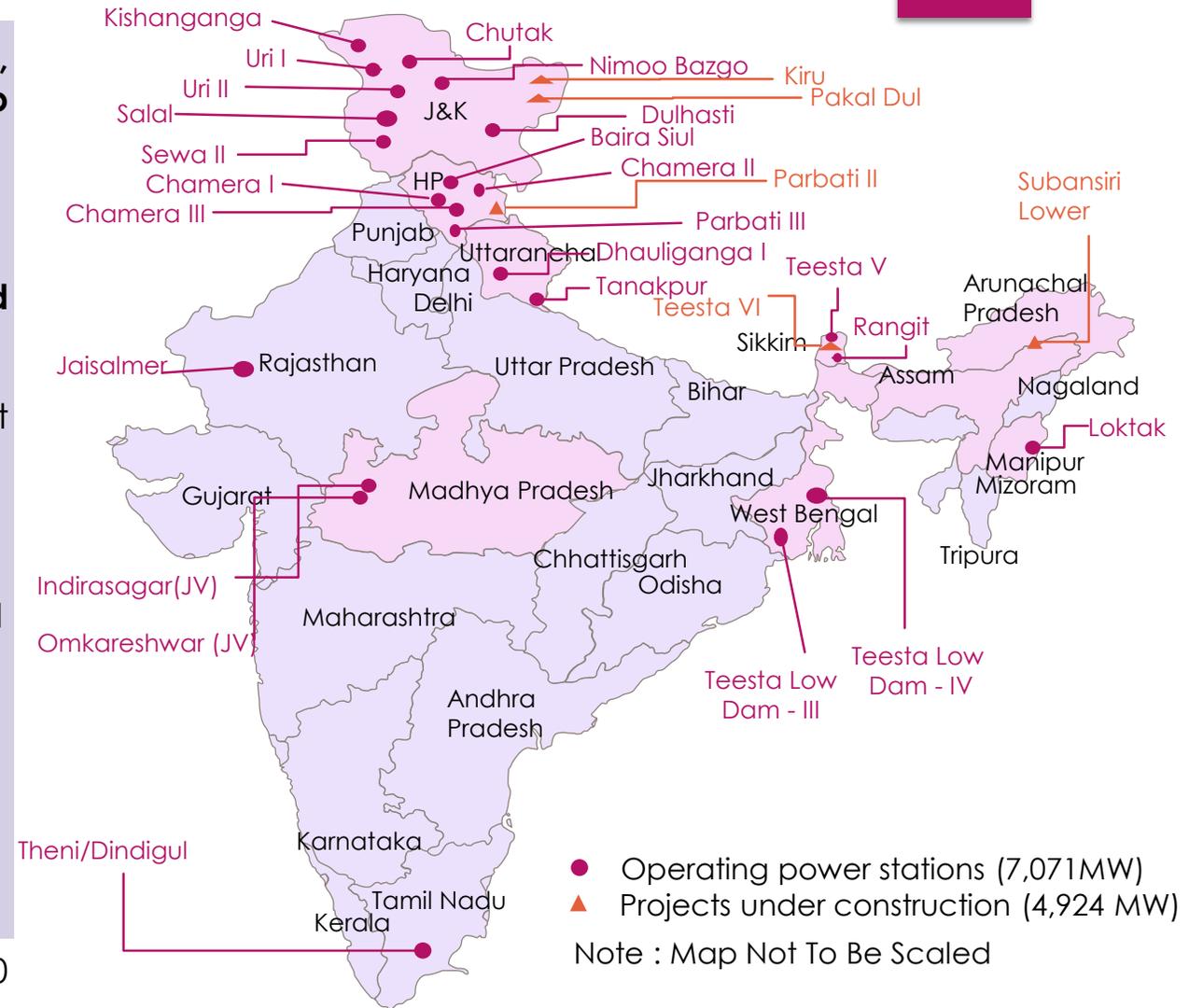
Teesta V, Sikkim

PHYSICAL SNAPSHOT

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- Incorporated in 1975 with authorised capital of Rs. 200 crore, the present authorised capital is Rs.15000 crore (Paid Up Capital Rs.10,045 crore)
- Mini-Ratna Category-I PSU (since Apr-08)
- Established track record, strong operational performance and in-house engineering capabilities
 - Involved across the entire chain of hydro power project development – from concept to commissioning.
 - Presence across 11 states.
 - 15% share of installed hydro-electric capacity in India (6,971 MW out of 45,798 MW*).
 - Consultancy business.
 - Power trading business.
 - Exposure to international business opportunities.

* Source-CEA as on 31.12.2020



7071 MW installed capacity (6971 MW Hydro & 100 MW Renewable Energy) through 24 power stations



PHYSICAL SNAPSHOT

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Installed Capacity

- ❖ Power Stations under Operation-22 Nos. (5551 MW*)
- ❖ Power Stations with Subsidiary (NHDC) - 2 Nos. (1520 MW)
- ❖ Total Operational Projects – 24 Nos. (7071 MW)

Under Construction

- ❖ Projects Under Construction (including Subsidiary & JV) :-
 - Hydro - 5 Nos. (4924 MW)

Awaiting Clearances

- ❖ Projects Awaiting Clearances : -
 - Standalone - 6 Nos. (6851 MW)
 - Joint Venture - 4 Nos. (3090 MW)
 - Subsidiary – 1 No. (66 MW)

Under Pipeline

- ❖ Projects under Pipeline 6 Nos. (2578 MW)

Hydro Power is 12% (45798 MW) of All India Installed Capacity (375323 MW**).

NHPC Contribution is 15% of Installed Hydro Power On Consolidated Basis.

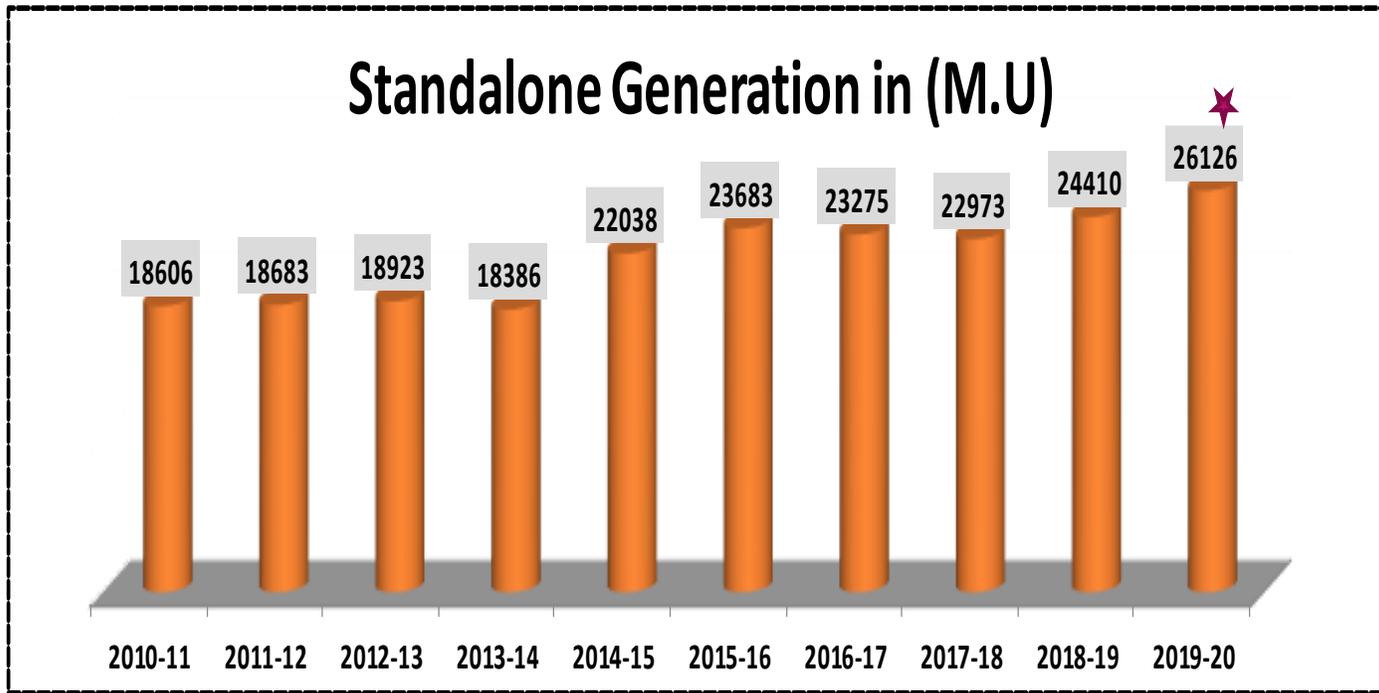
Status	Capacity (MW)
Operational Projects	7,071
Projects Under Construction (including Subsidiary & JV)	4,924
Projects Under Clearance:	
Stand alone	6,851
JV Projects	3,090
Subsidiaries	66
Projects Under Pipeline	2,578
Total	24,580

* Including 50 MW Wind Power Project, Jaisalmer & 50 MW Solar Power Project, Tamilnadu.

** Source-CEA as on 31.12.2020

NHPC 's Track Record – A Ten Year Digest

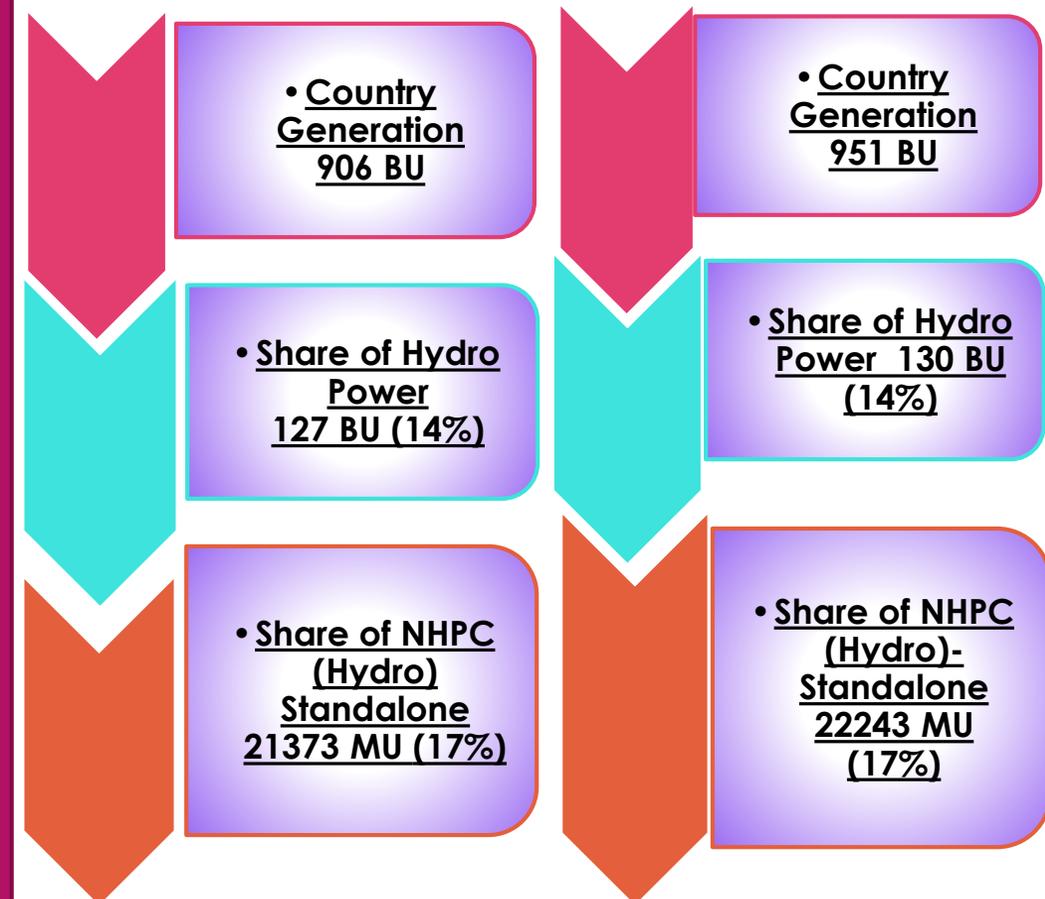
Standalone Generation in (M.U)



6

Actual 9M FY'21

Actual 9M FY'20



★ Hydro: 25976 MU(excl. infirm power of 190 MUs : Parbati II), Wind: 53 MU & Solar: 97 MU.

Financial Highlights



Sewa II, J&K



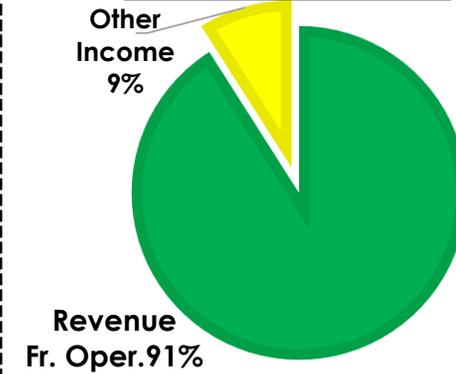
Chamera I, Himachal

Clean Power For Every Home

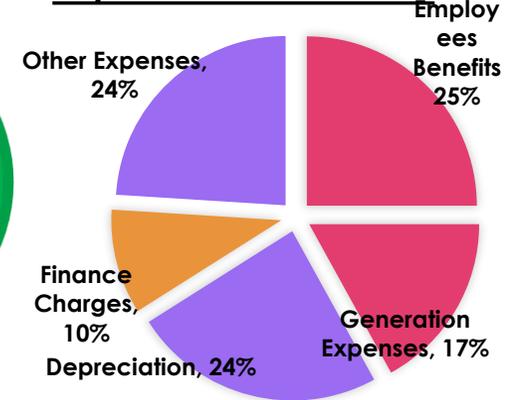
Financial Highlights : Standalone

Revenue & Expenditure-Analysis

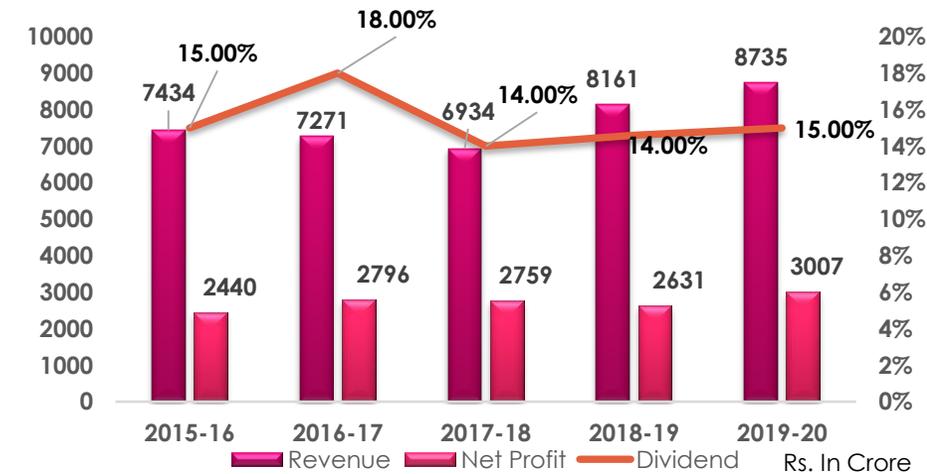
Revenue 9M FY'21



Expenditure 9M FY'21



Revenue Vs. Net Profit Vs. Dividend



Particulars	FY'21		FY'20			% Change	
	Nine Months	Qtr-3	Nine months	Qtr-3	Full Year	Nine Months	Qtr-3
Revenue from Operation	7165.1	2092.20	6821.72	1795.04	8735.41	5.03	16.55
Other Income	714.36	202.29	651.30	64.95	1036.18	9.68	211.45
Total Income (A)	7879.46	2294.49	7473.02	1859.99	9771.59	5.44	23.36
Purchase of Power - Trading	212.37	0	83.01	42.69	234.13	155.84	-100.00
Generation Expenses	723.19	118.85	735.62	158.11	901.67	-1.69	-24.83
Employee Benefits Expense	1048.75	378.74	1132.93	399.34	1515.52	-7.43	-5.16
Finance Cost	434.61	141.74	644.24	155.63	795.42	-32.54	-8.93
Depre. & Amort. Expense	998.38	334.94	1159.58	387.32	1545.34	-13.90	-13.52
Other Expenses	1009.37	416.63	860.50	267.13	1514.95	17.30	55.97
Total Expenditure(B)	4426.67	1390.90	4615.88	1410.22	6507.03	-4.10	-1.37
Exceptional Items (C)	185	0	0	0	0	0	0
Rate Regu. Income (D)	112.97	41.68	302.95	1.72	343.61	-62.71	2323.26
PBT (A-B-C+D)	3380.76	945.27	3160.09	451.49	3608.17	6.98	109.37
Tax	551.60	137.15	535.83	47.83	601	2.94	186.74
Profit After Tax	2829.16	808.12	2624.26	403.66	3007.17	7.81	100.20

Statement of Assets & Liabilities

Rs. In Crore

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Equity and Liabilities	9M- FY'21	FY'20
Share Holder's Funds	32412.76	29983.81
Loan Funds-Long Term	20451.60	20889.74
Deferred Tax Liabilities	3565.26	3641.19
Other Long term Liabilities & Provisions	4098.31	4169.54
Current Liabilities & Provisions	6439.59	5929.24
Total Equity & Liabilities	66967.52	64613.52
ASSETS		
PPE (incl. investment property)	20624.73	21467.82
Capital Work in Progress	17150.28	16097.65
Right of Use Assets	1809.25	1826.98
Intangible Asset	2.88	0.72
Non Current Financial Asset	8088.22	7635.30
Non Current Assets (Others)	3574.67	3162.51
Regulatory Asset	6949.19	6836.22
Trade Receivables	4170.30	3818.34
Cash and Bank Balances	1155.02	389.12
Current Assets (Others)	3442.98	3378.86
Total Assets	66967.52	64613.52

Debtors Position

Rs. In Crore

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Total Debtors (in Crs.)

S. N.	Particulars	As on 31.12.2020	As on 30.09.2020	As on 30.06.2020	As on 31.03.2020	As on 31.12.2019
1	Trade Receivables	4170	5005	4672	3818	3779
2	More than 45 days	3246*	3719*	3627*	3164*	2951*

Top Five Debtors (in Crs.)

Name	31.12.2020		31.03.2020	
	Total	More than 45 days	Total	More than 45 days
UPPCL, UP	1458	1384	1288	1226
PDD, J&K (Incl. JKPCCL)	1080	945	1450	1389
PSPCL, Punjab	353	318	135	98
JDVNL	143	133	157	143
WBSEDCL	119	79	126	89

* Net of Provision.

Incentives Position

Comparative Incentive YoY (in Crs.)

Sl.	Particulars	FY20-21					FY19-20				
		Q-1	Q-2	Q-3	Q-4	Total	Q-1	Q-2	Q-3	Q-4	Total
1	Secondary Energy	0.00	22.80	46.88	-	69.68	-	36.34	64.35	227.70	328.39
2	Incentives	148.25	136.54	75.11	-	359.90	141.63	113.12	91.37	14.83	360.95
3	Deviation Chrgs.	34.58	44.51	39.42	-	118.51	19.14	34.33	34.47	42.94	130.88
	G. Total	182.83	203.85	161.41	-	548.09	160.77	183.79	190.19	285.47	820.22
4	PAF	90.98%	91.65%	83.11%	-	88.59%	90.97%	90.03%	81.44%	73.71%	84.04%

Supplements

Power Station With Highest PAF Incentive : Salal (Rs. 70 Cr. PAF : 100.11%, NAPAF : 64%)

Power Station with highest Deviation Charges: Salal (Rs. 33 Cr.)

Power Station Giving Best Generation : Chamera-I (126% of the annual design energy)

Supplements

Power Station with Highest PBT- TLDP-IV (Rs. 540 Crs)

NHPC Profit per MW: Rs. 51 lakhs (9M FY'21), Rs. 47 lakhs (9M FY'20)

NHPC Profit per Employee: Rs. 49 lakhs (9M FY'21), Rs. 41 lakhs (9M FY'20)

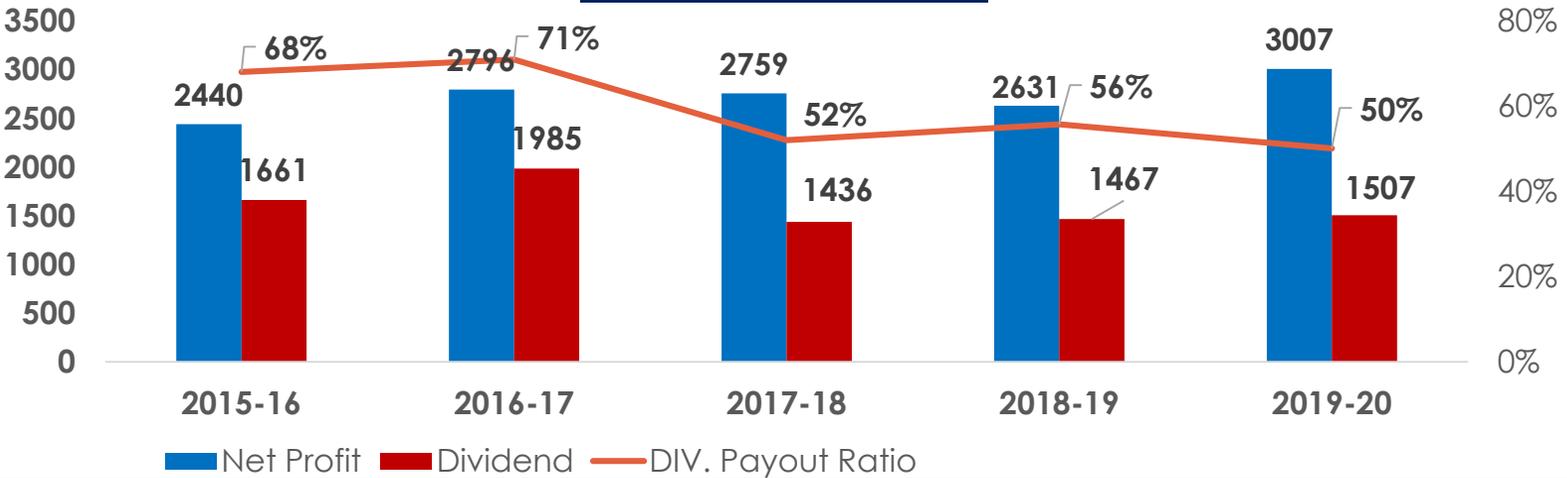
Key Financials : 9 Months FY'21

12 ₹ In Crore

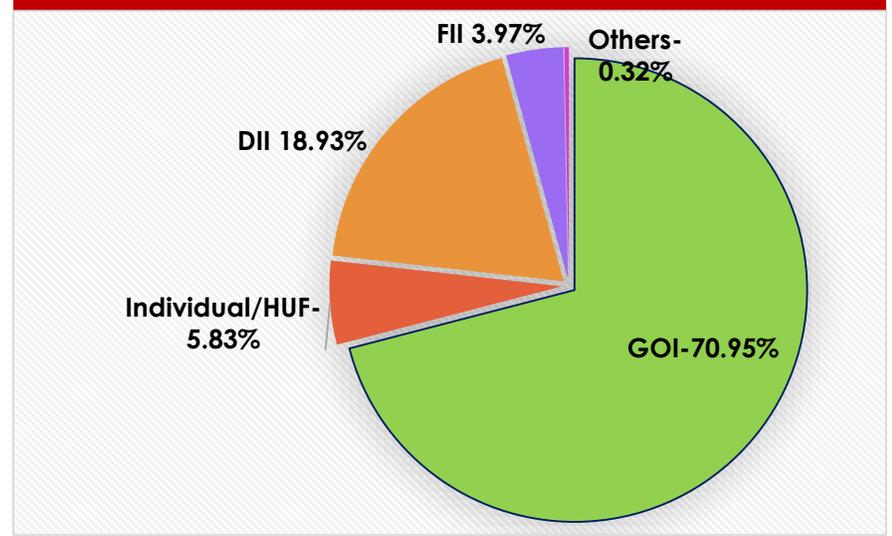
P&L	Standalone
Total Income	7879
EBITDA	4814
EBITDA Margin	61%
PAT	2829
Profit Margin	36%
Dividend Pay Out (FY'20)	Rs. 1.50 Per Share/ 50% of Profit

Balance Sheet	Standalone
Share Capital	10045
Net worth	32413
Long Term Debt	20452
Cash & Bank Bal.	1155
Gross Block	40751
CWIP	17150

Dividend Pay out



Shareholding pattern as on 31.12.2020



NHPC – Key Ratios

S. No.	Particulars	Nine Months FY'21		FY'20	
		Standalone	Consolidated	Standalone	Consolidated
1.	PAT (Rs. in Cr.)	2829.16	2829.45	3007.17	2874.61
2.	Net-worth (Rs. in Cr.)	32412.76	33797.95	29983.81	31370.61
3.	No. of Equity Shares (In Cr.)	1004.50	1004.50	1004.50	1004.50
4.	EPS (Rs.)	2.82*	2.82*	2.99	2.86
5.	Earning Yield(%)**	11.37*	11.37*	14.99	14.34
6.	Dividend Per Share (Rs.)			1.50	
7.	Dividend Yield(%)**			7.52	
8.	Book Value per share (Rs.)	32.27	33.65	29.85	31.23
9.	PB Ratio**	0.77	0.74	0.67	0.64
10.	PE Ratio**	6.60	6.60	6.67	6.98
11.	Return On Net worth (%)	8.73*	8.37*	10.03	9.16
12.	Market Capitalisation (Rs. in Cr.)**	24912		20040	
13.	Debt Equity Ratio	0.74	0.71	0.82	0.78

* Not annualised. ** Stock Price (BSE): as on 10.02.2021 Rs. 24.80 & as on 31.03.2020 Rs. 19.95.

NHDC Ltd. (Subsidiary) – Snapshots : FY19-20

Shareholding Pattern : 51:49 (NHPC : GoMP)

Installed Capacity : 1520 MW

Design Energy : 2120.17 MUs

Generation : 4110 MUs (FY'20), 1921 MUs (FY'19)

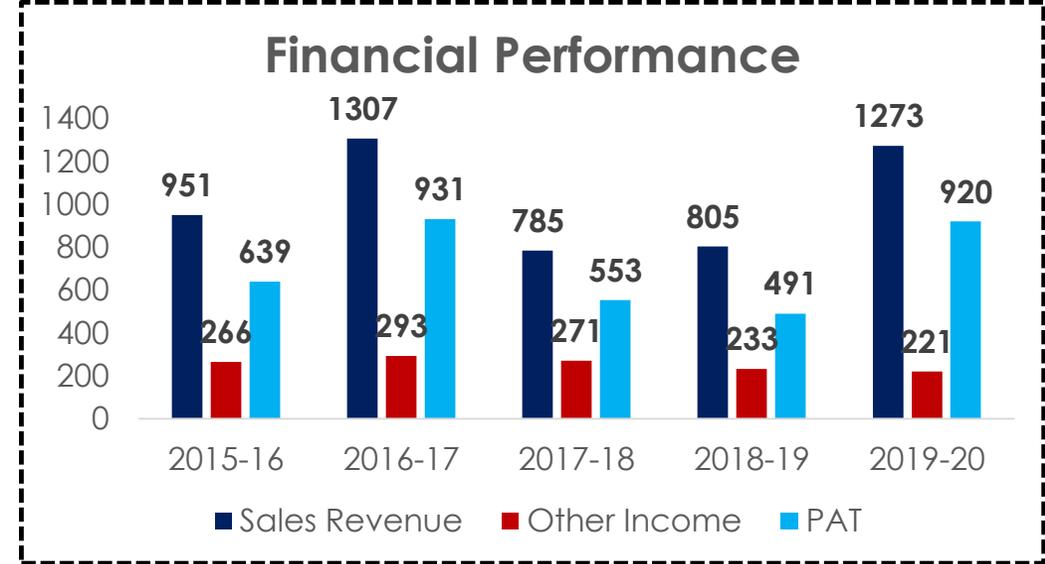
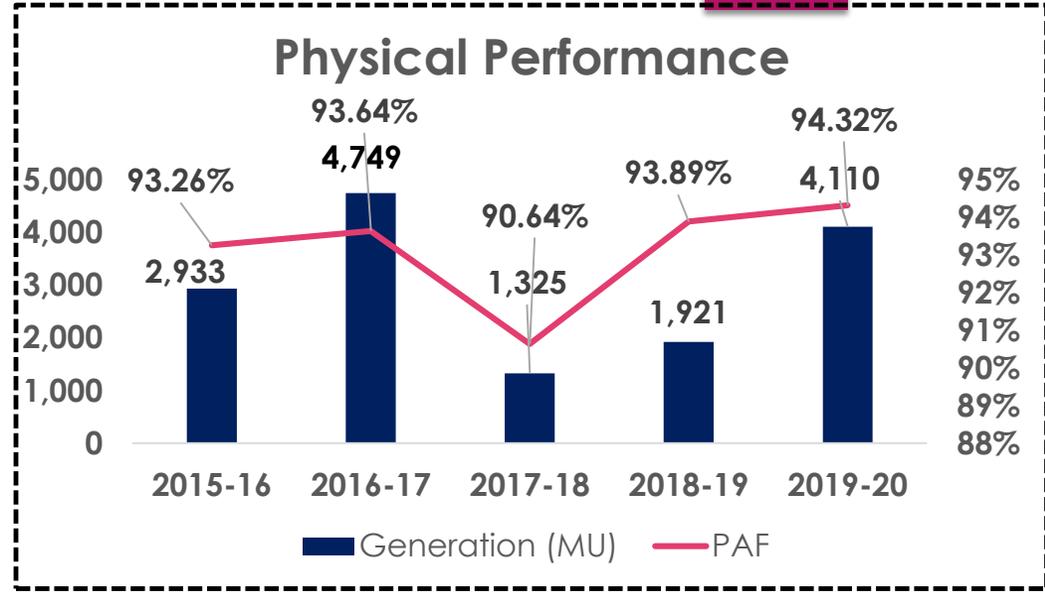
PAF : 94.32% (FY'20), 93.89% (FY19)

Revenue from operations : Rs. 1273 Crs. (FY'20), 805 Crs (FY'19)

PAT : 920 Crs. (FY20), 491 Crs. (FY19)

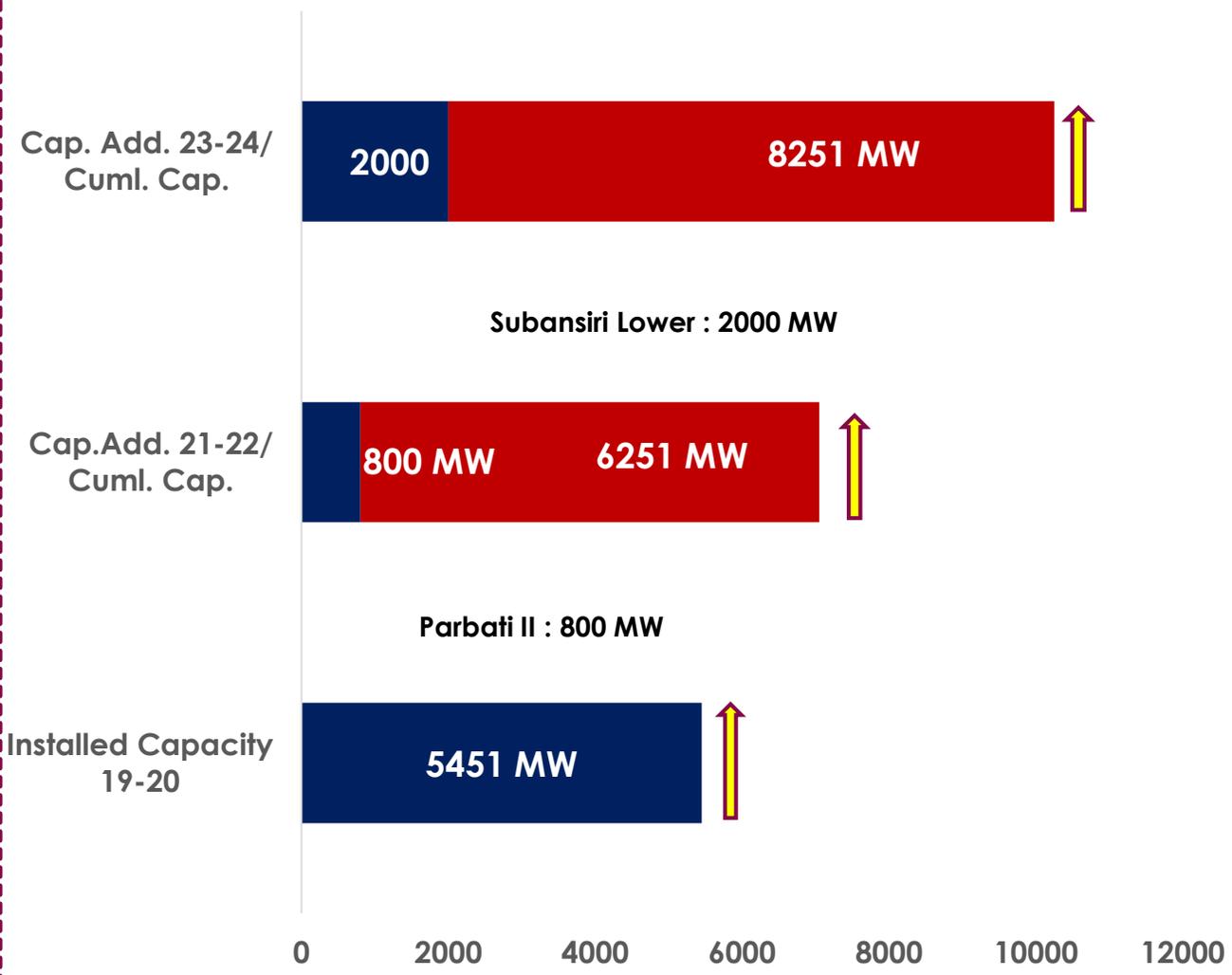
PAF Incentive : Rs. 32 Crs. (FY 20), Rs. 38 Crs. (FY 19)

Secondary Energy : Rs. 236 Crs. (FY 20), Rs. Nil Crs (FY 19)

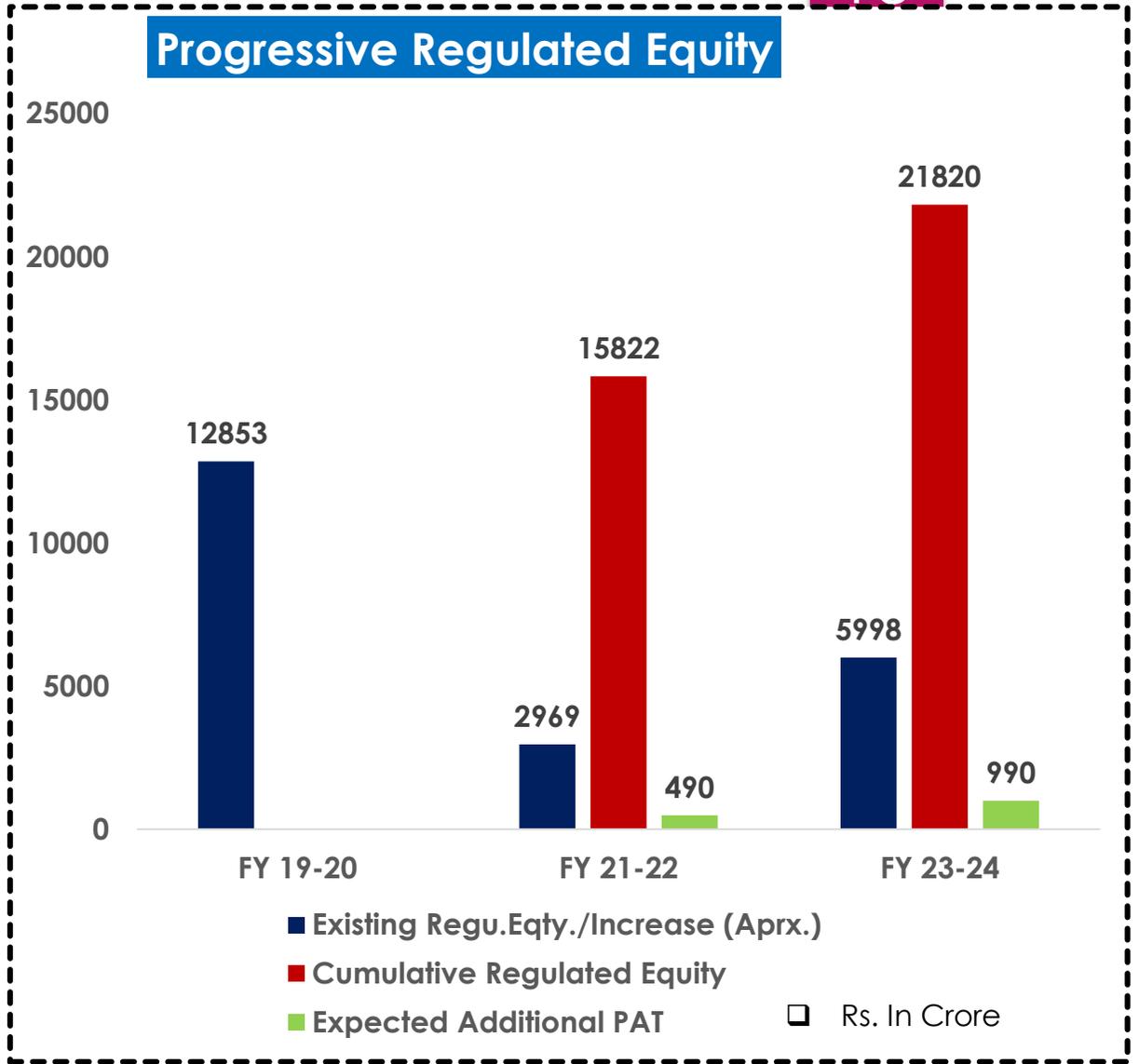


NHPC – Capacity Addition & Regulated Equity (Hydro)

Progressive Capacity Addition



Progressive Regulated Equity



Power Station with highest generation during 9M FY'21 : Salal (3251 MU, Annual D.E-3082 MU)

NHPC – CAPEX

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F.Y	Amount (Rs. In Crore)	Remarks
2014-15	2615	(Actual)
2015-16	2793	(Actual)
2016-17	2438	(Actual)
2017-18	2722	(Actual)
2018-19	2213	(Actual)
2019-20	4155	(Actual)
2020-21	6305	(RE)



- ❖ In principal Approval has been obtained from Ministry for development of 1200 MW Solar Power park scheme by Bundelkhand Saur Urja Limited under Ultra Mega Renewable Energy Power Parks (UMREPP) mode of the Solar Park Scheme in Jalaun District of Uttar Pradesh.
- ❖ An MoU has been signed with Green Energy Development Corporation of Odisha Ltd. (GEDCOL), for “Development of 500 MW Floating Solar Projects in Odisha under UMREPP” on 20th July 2020 with total estimated investment of Rs. 2500 Crore.
- ❖ Public Investment Board (PIB) has recommended 850 MW Ratle HE Project for implementation. The project shall be implemented by the Joint Venture of NHPC and Jammu & Kashmir State Power Development Corporation Limited (JKSPDC). The Union Cabinet on 20.01.2021 accorded investment approval Rs. 5281.94 crore for implementation of the project.
- ❖ MOUs have been signed with Jammu and Kashmir State Power Development Corporation Limited (JKSPDCL) on 03.01.2021 for execution of Kirthai-II HEP (930 MW), Sawalkot HEP (1856 MW), Uri-I (Stage-II) (240 MW), Dulhasti (Stage-II) (258 MW) HEP and Ratle HEP (850 MW) in Union Territory of Jammu & Kashmir.
- ❖ An MOU has been signed on 22.06.2020 with Hydropower Investment and Development Company Limited (HIDCL), Nepal for development of hydropower projects in Nepal.
- ❖ NHPC has diversified its portfolio to include Solar Power business and has given Letter of Awards (LOA) to Solar Power Developers for interstate transmission system (ISTS) grid connected photovoltaic projects aggregating to 2000 MW installed capacity. PPAs & PSAs have been signed for entire 2000 MW. Power Sell Agreements have been signed for procurement of 1680 MW Solar Power at the tariff of Rs. 2.55/KWh and for procurement of 320 MW Solar Power at the tariff of Rs. 2.56/KWh for 25 year on long term basis. NHPC shall earn trading margin @ Rs 0.07/KWh during the contract period.
- ❖ NHPC has emerged as successful bidder with a bid of Rs 165 crore in respect of Jal Power Corporation's Rangit project (120MW) in Sikkim. The Hon'ble NCLT Hyderabad has approved NHPC's Resolution Plan vide its order dated 24.12.2020. The Definitive Agreement for implementation of the Approved Resolution Plan was signed on 13.01.2021.

Other Business Initiative

☐ Solar Energy



Clean Power For EVERY HOME

Solar Power

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65 MW Solar Power Project in Jalaun, Uttar Pradesh

- JVC of NHPC Ltd. & UPNEDA namely 'Bundelkhand Saur Urja Limited' formed on 02.02.2015
- Share of NHPC & UPNEDA : $\geq 74 : \leq 26$

Current Status: Based on additional identified land, the earlier envisaged 32 MW Solar Project at Kalpi has been scaled up to 65 MW and fresh EPC tender has been invited. Last date of bid submission is 24.11.2020.

50 MW Floating Solar Project, Kerala

- NHPC is in process of development of Floating Solar Power project in West Kallada, Kerala.
- KSEB conveyed its in-principle consent go ahead for implementation of 50MW Floating Solar in West Kallada, Kerala.

Current Status: NIT for invitation of EPC bids floated on 30.06.2020. PPA under discussion with KSEB

140 MW Solar Park in Odisha

- MNRE has conveyed in-principle approval for setting up of two solar park in Odisha by NHPC.
- 40 MW shall be developed in 1st Phase at the identified land in Ganjam District and additional 100 MW shall be developed in 2nd Phase at the identified land in Deogarh District
- Approval of State Technical Committee (STC) for 40 MW & Additional 100 MW have been conveyed by M/s Green Energy Development Corporation of Odisha Ltd (GEDCOL).

Current Status : NIT for invitation of EPC bids for 40MW floated on 15.07.2020. Route survey for 100MW completed by Odisha Power Transmission Corporation Limited (OPTCL), Cost estimate for transmission line is under preparation with OPTCL.

Selection of Developers for Development of Aggregate 2000 MW ISTS connected Solar Power Project

- NHPC issued a Request for Selection (RFS) document as an Intermediary Procurer for selection of developer for development of aggregate 2000 MW Solar Power Projects on anywhere India basis.
- Letters of Award (LOA) to Solar Power Developers have been issued for 1600 MW (on 01.06.2020 and 02.06.2020) and LOA for balance 400MW has been issued on 09.07.2020.
- Current Status:** PPA/PSA signed for entire 2000 MW

1000 MW Floating Solar Power Projects under UMREPP Scheme of MNRE

- NHPC has been allotted the States of Telangana, Odisha and J&K for development of Ultra Mega Renewable Energy Power Parks (UMREPPs).
 - Odisha:** 500 MW Floating Solar Projects in various reservoirs of Odisha has been proposed to be set up by NHPC under JV Mode with State Nodal Agency, GEDCOL. MoU between NHPC and GEDCOL has been signed on 20.07.2020. Formation of JV Company is under process.
 - Telangana:** 500 MW Floating Solar Project in reservoir of Midmanair Dam has been proposed to be set up by NHPC under JV Mode with State Nodal Agency, TSREDCO. Draft MoU between NHPC and TSREDCO is under approval with Govt. of Telangana. Process is presently held up due to COVID crisis.
- Current Status:** Approval of MoU with Telangana presently held up due to COVID crisis.

NHPC Projects At A Glance



NHPC-Energising India With Hydropower

S. No	NHPC Project & State/UT	Installed Capacity (MW)	Design Energy (MU)	Year of comm.	Capital Cost as on 31.03.20	Tariff (18-19) (Rs. /Kwh)*	Type of the project
1	Baira Siul (3x60) Himachal Pradesh	180	779.28	1981 (Sep)	204.86	2.04	Run of River (ROR) with small pondage
2	Loktak, (3*35) Manipur	105	448.00	1983 (May)	195.35	3.86	Storage
3	Salal, (6x115) Jammu & Kashmir	690	3082.00	1987 (Nov)	1050.10	2.34	ROR
4	Tanakpur, (3x40) Uttarakhand	94	452.19	1992 (Apr)	421.33	3.30	ROR
5	Chamera-I, (3x180) Himachal Pradesh	540	1664.55	1994 (Apr)	2091.88	2.28	Storage
6	Uri-I, (4x120) Jammu & Kashmir	480	2587.38	1997 (Apr)	3442.46	2.10	ROR
7	Rangit, (3*20) Sikkim	60	338.61	2000 (Feb)	504.94	3.81	ROR with small pondage
8	Chamera-II, (3*100) Himachal Pradesh	300	1499.89	2004 (Feb)	2018.64	2.01	ROR with small pondage
9	Dhauliganga-I, (4x70) Uttarakhand	280	1134.69	2005 (Oct)	1769.07	2.43	ROR with small pondage.
10	Dulhasti, (3x130) Jammu & Kashmir	390	1906.8	2007 (Mar)	5242.86	5.99	ROR with small pondage

NHPC – Projects in Operation... contd.

S.No.	NHPC Project	Installed Capacity (MW)	Design Energy (MU)	Year of Comm.	Capital Cost as on 31.03.20	Tariff (18-19) (Rs. /Kwh)*	Type of the project
11	Teesta-V, (3x170) Sikkim	510	2572.70	2008 (Mar)	2796.72	2.33	ROR with small pondage
12	Sewa-II, (3x40) Jammu & Kashmir	120	533.53	2010 (Jun)	1151.65	5.48	ROR with small pondage
13	Chamera-III , (3x77) Himachal Pradesh	231	1108.17	2012 (Jun)	2129.07	3.94	ROR with small pondage
14	Chutak , (4x11) Jammu & Kashmir	44	212.93	2013 (Jan)	937.39	8.73	ROR
15	TLDP-III, (4x33) West Bengal	132	594.07	2013 (Mar)	1931.49	4.75	ROR with small pondage
16	Nimoo Bazgo, (3x15) Jammu & Kashmir	45	239.33	2013 (Jan)	1071.98	10.03	ROR with small pondage
17	Uri –II, (4x60) Jammu & Kashmir	240	1123.77	2014 (Feb)	2331.36	5.14	ROR
18	Parbati-III (4x130) Himachal Pradesh	520	1963.29	2014 (May)	2722.05	3.08	ROR with small pondage
19	TLDP IV (4x40), West Bengal	160	720.00	2016 (Aug)	1698.86	4.61	Run of River with small pondage
20	Kishanganga (3x110) Jammu & Kashmir	330	1712.96	2018 (Mar)	5812.70	4.10	Run of River with Pondage
	Total-A	5451	24674.14		39524.75	3.39	* Tariff for 2019-20 yet to be notified.

Renewable Energy

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S.No	Project	Installed Capacity (MW)	Design Energy (MU)	Year of Comm.	Capital Cost as on 31.03.2020	Tariff 19-20 (Rs./unit)	Place of Project
1	Wind Power	50	94.25	2016	330.40	3.67	Lakhmana, Jaisalmer
2	Solar Power	50	105.96	2018	290.59	4.41	Theni/Dindigul District, Tamilnadu
	Total-B	100	200.21		620.99		
Sub Total Stand-alone(A+B)		5551	24874.35		40145.74	3.40	

Operational Projects with Subsidiary

S.No	Project	Installed Capacity (MW)	Design Energy (MU)	Year of Comm.	Capital Cost	Tariff 18-19 (Rs./Kwh)*	Type of the project
1	Indrasagar, (8x125) Madhya Pradesh	1000	1442.70	2005	4865.09	3.71	Storage
2	Omkareshwar, (8x65) Madhya Pradesh	520	677.47	2007	3152.66	5.96	Storage
	Total-C	1520	2120.17		8017.75		* Tariff for 2019-20 yet to be notified.
Grand Total-D:(A+B+C)		7071	26994.52				

NHPC: Projects Under Construction



NHPC Project	Installed Capacity (MW)	Design Energy (MU)	Type of the project	CCEA Estimated Cost (Rs. Crore) (Price Level)	Anticipated Project Cost (Rs. Crore)	Provisional Project Expenditure till – Dec'20 (Rs. Crore)	Expected Commissioning Schedule
Subansiri Lower (250X8) Assam/ Ar. Pradesh	2000	7422	Run of River	6285.33 (Dec02)	19992.43 (Jan'20)	12855.18	FY 23-24 (Q-2)
Parbati II (200x4) Himachal Pradesh	800	3125	Run of River with small pondage	3919.59 (Dec01)	9897.59 (Apr'20)	8705.10	FY 21-22 (Q-4)
Total (A)	2800	10547		10204.92	29890.02	21560.28	

Project Under Construction-Subsidiary

S.No	Projects	Installed Capacity (MW)	Design Energy (MUs)	Cost (In Cr.) & PL	Status
1	Lanco Teesta Hydro Power Limited (wholly owned subsidiary of NHPC Ltd.)				
i)	Teesta VI (4x125) Sikkim	500	2400	5748 (July'18)	<ul style="list-style-type: none"> 01 Package of Civil Works(Lot-1), 01 Package of HM works (Lot-III) & 06 packages of E&M works(EM-I, EM-II, EM-III, EM-V, EM-VII & EM-VIII) awarded and tendering of balance packages (EM-IV & EM-VI) is in process. The LOA of Lot II Civil Contractor has been annulled on 06.11.2020 due to non-submission of PBG within stipulated period. Fresh tender for the same is in process. Mobilization of manpower and machinery by the contractors affected due to COVID-19 Lockdown/restrictions. Free interstate movement have been allowed by Govt. of Sikkim from 01.10.2020. Planning & establishment works including obtaining necessary approvals from State Administration is being done by contractor. Land for permanent works, quarry, dumping have been handed over to Lot I contractor. Dewatering of HRT at Adit-I, Adit-II is in progress. Drilling work for concrete cutting & dismantling in head regulator adjacent to existing bay no.4 of barrage is in progress.
TOTAL (B)		500	2400	5748	

Project Under Construction-JV						
S.No	Projects	Installed Capacity (MW)	Design Energy (MUs)	Cost (In Cr.) & PL	Expected Commissioning Schedule	Status
1	Chenab valley Power Projects Ltd. (JV between NHPC (49%) JKSPDC (49%), & PTC (2%))					
i)	Pakal Dul (4x250) J&K	1000	3330	8112 (Mar 13)	FY 25-26 (Q-2)	<ul style="list-style-type: none"> Civil construction activities for Power House and Dam works are in progress. Letter of award for HRT-TBM Package issued on 03.07.2020. Detailed Engineering of TBM & segment design are in progress.
ii)	Kiru (4x156) J&K	624	2272	4288 (July18)	FY 24-25 (Q-2)	<ul style="list-style-type: none"> LOA's for all the three packages have been issued on 24.02.2020. Civil works started. Detailed Engineering of HM & EM components are in progress
TOTAL (C)		1624	5602	12400		
Grand Total (A+B+C)		4924	18549			

NHPC Standalone Projects Under Clearance



S.No.	Projects	Installed Capacity (MW)	Design Energy (MUs)	Cost (In Crore) & PL	Status
1	Kotli BheI-IA (3x65) (Uttarakhand)	195	1026	2321 (Mar 19)	PIB had recommended the project for investment subject to clearance from Hon'ble SC for Uttarakhand Projects. Decision of Hon'ble SC is awaited.
2	Teesta-IV (4x130) (Sikkim)	520	2252	5698 (May 20)	All statutory clearances received except forest clearance (stage-II). FRA Compliance is underway. Approval for pre-investment activities is available. Cost Estimate at May, 2020 PL is under examination at CEA for vetting.
3	Dibang (12x240) (Ar. Pradesh)	2880	11223	30830 (Aug 20)	Concurrence to Project, Environment Clearance, Forest Clearance (Stage-I) and FRA clearance available. CCEA approval for Rs. 1600 crore to incur expenditure on pre-investment activities & balance clearances of the project accorded. FC (St-II) accorded on 12.03.2020. Matter regarding cost of compensation for land acquisition is subjudice. Updated cost estimate of project at Aug'20 PL is under examination at CEA.
4	Tawang -I (3x200) (Ar. Pradesh)	600	2963	5911 (Nov 20)	All statutory Clearances have been received except Forest clearance. FRA compliance is underway and Basin Study Report has been submitted and accepted. After receipt of Forest Clearance (Stage-I), the process for PIB / CCEA shall be initiated. Approval of Pre-investment activities is available.
5	Tawang -II (4x200) (Ar. Pradesh)	800	3622	7515 (Nov 20)	All statutory clearances received except forest clearance (stage-II). FRA Compliance is underway. Approval of pre-investment activities is available.
6	Sawalkot (UT of J&K)	1856	7995	20872 (Nov 20)	MOU has been signed between NHPC Ltd. and JKSPDCL on 03.01.2021. The project shall be executed by NHPC on BOOT basis for the period of 40 years
Total		6851	29081	73147	

NHPC –JV Projects Under Clearance



Projects Under JV

S.No	Projects	Installed Capacity (MW)	Design Energy (MUs)	Cost (In Cr.) & PL	Status
1	Kwar (4x135) UT of J&K (JV between NHPC (49%) JKSPDC (49%), & PTC (2%))	540	1976	4633 (Sept'20)	<ul style="list-style-type: none"> All clearances are available. UT of JK has conveyed its approval vide letter dated 11.11.2020 for exemptions of free power & water usage charges for first 10 years and waiver of SGST of all supplies. MoP vide letter dated 01.12.2020 forwarded draft PIB note to CEA with a request to examine and vet the proposal. CEA vide letter dt 17.12.2020 has vetted the project cost and IDC & FC. As directed by MoP, revised Material for PIB Memo based on the cost vetted by CEA submitted to MOP on 21.12.2020. CEA examined the alternate cost & tariff scenario. As desired by MoP, modified Draft PIB Note incorporating O&M expenses @ 2.5%, O&M Escalation @ 4%, Interest rate on loan @ 9.3% and exemptions of UT of J&K, submitted to MoP vide email dated 07.01.2021. As desired by MOP, alternative Tariff Scenarios with interest Rate @ 9.3% p.a submitted to MOP vide mail dated:21.01.2021.
2	Ratle (4x205 +30) UT of J&K (JV between NHPC (51%) JKSPDC (49%))	850	3137	5282 (Nov 18)	<ul style="list-style-type: none"> A MoU has been exchanged among NHPC Limited, Jammu & Kashmir State Power Development Department (JKPDD) and J&K State Power Development Corporation (JKSPDC) for execution of 850 MW Ratle Hydroelectric Project (Jammu & Kashmir) in the august presence of Prime Minister of India on 3rd Feb 2019. Public Investment Board (PIB), during its meetings held on 09.03.2020 and 07.09.2020 discussed the project proposal. A Supplementary MoU to the initial MOU has been finalized in line with the recommendations of the PIB and signed on 03.01.2021. As per PIB press release dated:20.01.2021, Cabinet approved the investment proposal of Rs.5281.94 Crore for 850MW Ratle Hydro Power Project. Order awaited from MOP. The other codal formalities for formation of new JVC are under process. Tendering for execution of Ratle H.E. Project through EPC mode is in progress.
3	KIRTHAI-II (6 x 140 + 2 x 35 + 2 x 10)	930	3330	6384 (Feb-20)	<ul style="list-style-type: none"> MOU has been signed between NHPC Ltd. and JKSPDC on 03.01.2021. The project shall be executed by M/s CVPPPL on the same terms and conditions of that of Pakaldul, Kiru & Kwar H E Projects.
TOTAL		2320	8443	16299	

Projects Under JV

S.No	Projects	Installed Capacity (MW)	Design Energy (MUs)	Cost (In Cr.) & PL	Status
Foreign Assignment Under JV Scheme					
1	Chamkharchhu (Bhutan)	770	3344	7020.72 (Dec 16)	<ul style="list-style-type: none"> Project to be developed by JVC of NHPC and DRUKGreen Power Corporation, Bhutan. Joint venture Agreement cum Share Holder's Agreement of proposed JV Company is ready for signing. SHA & AOI shall be signed after finalisation of concession agreement with RGoB & CCEA approval of Gol. Revised draft material for PIB Memorandum submitted to MoP on 23.06.2017 & PIB memo circulated by MoP on 08.09.2017. Reply to all observations of various agencies stand submitted. NHPC vide letter dated 23.06.2020 has requested MoP to take up the issue of finalization of Concessional Agreement with MEA. PIB memo circulated by MOP on 08.09.2017. Comments of CEA, MEA , NITI Aayog, DOE (MoF), DEA (MoF) have been replied. MOP on 01.02.18 was requested to take up the matter with MEA for finalization and signing of concession Agreement with DGPC, Bhutan.
JV Grand Total		3090	11787	23320	

Projects Under Subsidiary

S.No	Projects	Installed Capacity (MW)	Design Energy (MUs)	Cost (In Cr.) & PL	Status
1	Loktak D/S (2x33) Manipur (JV between NHPC (74%) & Govt. of Manipur (26%))	66	333.76	1311 (Jul 20)	<ul style="list-style-type: none"> All statutory clearances of project except CCEA are available. Tendering of all major works is in process. PPA signed between Govt. of Manipur and LDHCL on 31.08.2020. PIB Memo based on CEA vetted cost estimate circulated by MoP to various appraising agencies on 28.01.2021.
TOTAL		66	333.76	1311	

NHPC –Projects Under Pipeline



S. No.	Projects	State	Installed Capacity (MW)	Status
Projects Under FR/DPR Preparation				
1	Garba Tawaghat	Uttarakhand	630	<ul style="list-style-type: none">Implementation of the project is hold due to the following reasons:<ul style="list-style-type: none">a) To take up the matter at appropriate forum for obtaining consent of Govt. of Nepal.b) Issuance of final Notification of boundary of Eco-Sensitive zone of Askot Wildlife Sanctuary by MoEF.8th Indo-Nepal JSC/JWG meeting was held on 10th-11th December 2020, but the matter was not discussed, though its inclusion as agenda point was proposed by NHPC.A letter dtd 15.01.2021 has been sent by CMD, NHPC to Secy. (Water Resource) with a request to take up the matter with Govt. of Nepal/appropriate forums for clearance under Mahakali Treaty.
2	Bursar	UT of J&K	800	<ul style="list-style-type: none">DPR has been submitted to CEA on 06.01.17 & is under examination at CEA/CWC.Defence clearance, wildlife clearance accorded.Environment clearance recommended by MoEF&CC, issue of EC letter pending for Forest clearance. Forest clearance is in process.

NHPC –Projects Under Pipeline



S. No.	Projects	State	Installed Capacity (MW)	Status
Projects Under FR/DPR Preparation				
3	Dugar	Himachal Pradesh	500*	<ul style="list-style-type: none"> State Government on 07.08.2018 conveyed their decision to allot Dugar HE Project to NHPC on Build-Own-Operate and Transfer basis (BOOT) for a period of 70 years subject to certain terms & conditions. MoP on 24.07.2019 conveyed it's no objection for the development of Dugar HE Project (449 MW) by NHPC subject to accord of approval from PIB/CCEA for investment etc. Thereafter, a MoU was signed on 25.09.2019 between NHPC and Govt. of Himachal Pradesh for implementation of the Dugar HE Project (449 MW) by NHPC on BOOT basis for a period of 70 years. *Project Installed capacity increased from 449 MW to 500 MW as per Power Potential Study by HPA, CEA on 22.10.2020, resulting increase in design energy from 1610 MU to 1758.40 MUs. Detailed Project Report (DPR) has been submitted to CEA on 25.11.2020. Survey and Investigation of the project is under progress.
4	Goriganga-III A	Uttarakhand	150	<ul style="list-style-type: none"> ToR for the project available. EIA /EMP studies in process. Final notification for Demarcation of Eco-sensitive zone for Ascot wildlife Sanctuary is yet to be notified. DPR prepared and submitted to CEA on 30.03.18/02.04.2018. CEA accepted the DPR for appraisal on 07.05.2018 and checking in different Directorates of CEA/CEC is in progress. However, since the matter of extending exemptions by GoUK/Gol is yet to be decided, it has been communicated by CEA letter dated 22.01.2021. That it has been decided by the competent authority to suspended the examination of DPR of Goriganga - IIIA HE Project and delist it from the list of 'DPR's under examination till such time.

NHPC –Projects Under Pipeline

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S. No.	Projects	State	Installed Capacity (MW)	Status
Projects Under FR/DPR Preparation				
5	Uri-I Stage-II	UT of Jammu & Kashmir	240	<ul style="list-style-type: none">MOU has been signed between NHPC Ltd. and JKSPDCL on 03.01.2021.The project shall be executed by NHPC on BOOT basis for the period of 40 years.
6	Dulhasti Stage-II	UT of Jammu & Kashmir	258	<ul style="list-style-type: none">MOU has been signed between NHPC Ltd. and JKSPDCL on 03.01.2021.The project shall be executed by NHPC on BOOT basis for the period of 40 years
Total			2578	



Thank
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