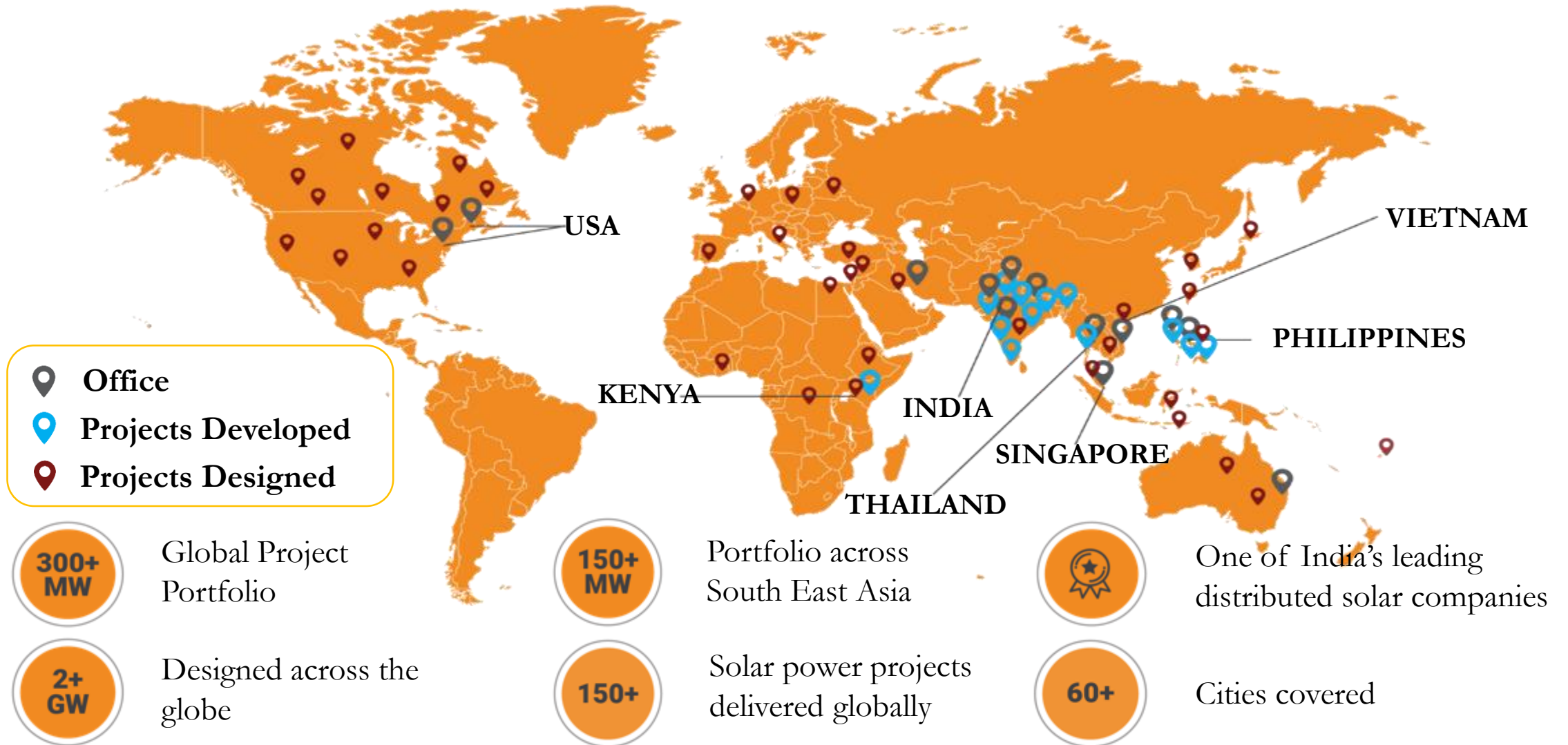




Distributed PV: Developer Perspective



A Leading Global Distributed Solar Company



SunSource is an investee company of the State Bank of India (SBI) and U.K. Government

Is the Rooftop PV Business Profitable In India?

Developers

- Rooftop PV Business in India is highly competitive yet profitable business
- Businesses that focus on solving customers problems and adapt fast pacing technology will continue to remain profitable for a foreseeable future
- C&I segment is the more profitable segment at this point of time

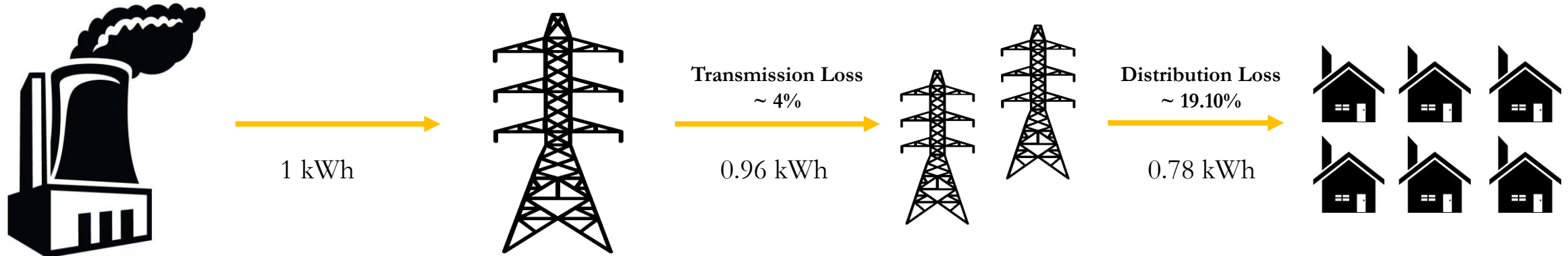
Discom

- Rooftop Solar plant are developed at the point of consumption limiting T&D losses which can be as high as up to 20-25%
- Discoms can cater to additional demands without investing on infrastructure and distribution network upgrade

Customer

- Solar has already achieved grid parity
- With net metering, the customers can now become consumers

Is the Rooftop PV Business Profitable in India?



22% of every unit of electricity that is generated is lost due to T&D losses leading to increase in financial burden on discoms. Solar can help reduce this problem

BENEFITS TO DISCOM

- Avoided Generation Cost
- Avoided Power Purchase Cost
- Avoided Transmission Charges
- Avoided Distribution Capacity Costs
- Avoided REC Costs
- Avoided Working Capital requirement

BENEFITS TO CONSUMER

- Green Energy
- High reliability and quality
- Lower DISCOM Tariff
- Chance of being Prosumer

Scaling-up Investment in Distributed PV Technology and Deployment

Solar empowered DISCOM

- Each DISCOM to have nodal person for solar rooftop and time bound promotion of solar rooftop
- Uniform grid code, SOP to include solar rooftop promotion

Easy financing platform

- Each DISCOM to have nodal person for solar rooftop and time bound promotion of solar rooftop
- MNRE to constitute financing platform for capacity enhancement of stakeholders related to rooftop financing
- MNRE + MOP to evolve fiscal instruments to promote solar rooftop

Central authority to monitor renewable target compliance

- Lack of central authority to monitor renewable target compliance by states
- Uniform solar installation capacity limits by states

Solar + SAGY + KUSUM is the way forward for distributed solar in Villages

- Combination of **Solar, Saansad Adarsh Gram Yojna (SAGY) and KUSUM** may help creating '**Adarsh Avm Swachh Gram**', a step towards **Atmanirbhar Bharat**
- Distributed Solar Solution for Rural creates Win-Win Solution
 - Win for DISCOM-** Cross-subsidising burden on DISCOM will be reduced as Cost to Serve is high for Rural, AT&C Losses reduces, better balance sheet
 - Win for Rural Economy** – Embedded rural economic empowerment due to adequate and quality resources
 - Win for State** – Tariff Subsidy burden on State reduces, Flourishing rural economy will push SGDP, lesser burden on Urban cities
- We see 6.4 lakh villages as 6.4 lakh embedded rural GDP growth engines

Scaling-up Investment in Distributed PV Technology and Deployment

Consistent policies across central, state, net-metering and open access- 5- government intervention slide

- The open access solar market in India offers parallel opportunities for stakeholders, including large corporates, solar project developers, investors, and power distribution companies, to participate in India's solar dream

Application of Storage Technology at Remote Locations

- Government has already identified remote locations high terrain areas that are currently reliant on diesel based power
- Solar+ Storage solution in these locations can reduce electricity cost in discoms by 450%
- This will lead to increased domestic manufacturing and will make storage a cost effective option in India



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