POWERGRID

Fastest Growing Electric Utility in the World

Press & Analysts’ Meet
November 12, 2014  Mumbai
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- Annual Accounts for FY2013-14 have been approved by the shareholders.
## Recent Highlights

<table>
<thead>
<tr>
<th>Company completes 25 years</th>
<th>Power Supply Restoration (post natural calamities) - J&amp;K and Andhra Pradesh</th>
<th>Fastest Growing Electric Utility in the World¹</th>
</tr>
</thead>
</table>

¹ Based on Platts Top250 Ranking of Global Energy Cos. For 2014
Incorporated on 23rd Oct, 1989 as ‘National Power Transmission Corporation Limited’

ER-NER grids synchronized

- Renamed ‘Power Grid Corporation of India Limited’ w.e.f 23rd October 1992
  - Commercial Operation starts

- 1st MOU with GoI
- 1st World Bank loan directly to Company

Maiden Dividend declared for Rs.5 crore (FY93-94)

Commencement of business w.e.f. Nov. 8, 1990


RLDC amalgamation & modernization starts (SRLDC- 1994)

Amalgamation
Company receives ISO 9001 (1994) Quality System Certification for turnkey execution of 400kV trans. projects

Awarded 1996-ARTDO Asia-Pacific Award (Only PSU in Asia Pacific Region)

• Turnover crosses Rs.1000 crore
• 1st ever National Consultation in Asia to finalize ESPP

Jointly promoted Power Trading Corporation of India Ltd.

1995

1996

1997

1998

1999

Amalgamation & Modernization

Amalgamation of RLDCs completed. Modernization of RLDCs starts.

• Notified as ‘Central Transmission Utility’
• Declared as Mini-Ratna Category I PSU
• Chandrapur HVDC commissioned
• Demonstrated use of ERS under natural calamity
- Diversifies into Telecom business
- 1st Telecom link (Delhi-Chandigarh) inaugurated by Hon’ble PM of India

- Commercial Operation of Delhi-Chandigarh Telecom link
- EoIs invited for taking up projects under IPTC route

- 1st JV in ISTS established (for Tala TS)
- WR-ER-NER grids synchronized
- 1st Intl Consultancy Contract secured

2000

2001

2002

2003

2004

- Inauguration of modernized load dispatch facilities by Hon’ble PM
- Delhi-Mumbai Telecom link inaugurated by Hon’ble PM
- Appointed as Advisor-cum-Consultant by GoI for APDRP implementation

- Short Term Open Access commences
- Enters into MoU for Rural Electrification works
• +/-800kV HVDC conceived for power transfer from NER
• WAMS conceived for introducing Smart Power Delivery System

2005

• NR grid synchronized with WR-ER-NER grid to form ‘NEW’ Grid
• Profits cross Rs.1000 crore
• Commissions 100th sub-station (Amritsar)

2006

• Declared as ‘Navratna’ enterprise by GoI
• Turnover crosses Rs.5000 crore
• Ranked as world’s 3rd largest Trans. Co. by The World Bank

2007

• Initial Public Offer of Equity Shares
• Shares listed on BSE and NSE
• 1st 765kV line (Sipat - Seoni) commissioned
• 1st GIS commissioned (Maharanibagh)

2008

• NLDC established
• POSOCO incorporated for Grid Mgmt.
• Prestigious Afghanistan project completed

2009
- Joins Gov for NKN Project (Telecom)
- 1st Follow On Public (FPO)
- 1st Sustainability Report released (for FY09) - 1st Power Sector CPSU

2010

- Implementation of NTAMC taken up
- Participates in TBCB for the 1st time and emerges successful

- Intl. Credit Rating by S&P and Fitch
- 1st Foreign Currency Bond issue
- 2nd Follow On Public Offer
- SR synchronized with NEW Grid: ‘One Nation- One Grid- One Frequency’
- 1st Mgmt Contract (Intl) secured
- Joins Gov for NOFN Project (Telecom)
- Bangladesh interconnection established

2011

- Adoption of ‘Vision’ Statement
- 1200kV Test line charged (highest trans. Voltage in world)
- India’s 1st Smart Grid Control Center established at Puducherry under pilot project
- Turnover crosses Rs.10,000 crore
- 1st Intl. JV Agreement signed (with NEA in Nepal)

2012

- Implementation of Green Energy Corridors starts
- NTAMC operation starts
- Aerial Patrolling of TLs undertaken
- Gov assigns NER & J&K works
- Becomes Fastest Growing Electric Utility globally

2013

- Implementation of Green Energy Corridors starts
- NTAMC operation starts
- Aerial Patrolling of TLs undertaken
- Gov assigns NER & J&K works
- Becomes Fastest Growing Electric Utility globally
25 years of Energizing India

- ckm - MVA - S/S
- Gross Fixed Assets - Income - PAT
- Dividend
- Consultancy - Telecom
- IR Trf - STOA (Txn) - STOA (Engy)
- Manpower - ckm/ employee - PAT per Employee

Key figures:
- FY93: 1.0, 1.0, 1.0, 1.0, 1.0, 1.0
- FY94: 13.7, 27.0, 143.0, 110.0, 77.0, 44.0
- FY99: 4.7, 27.0, 143.0, 110.0, 77.0, 44.0
- FY04: 13.7, 27.0, 143.0, 110.0, 77.0, 44.0
- FY09: 25.0, 19.0, 110.0, 77.0, 44.0, 5.0
- FY14: 27.0, 25.0, 143.0, 110.0, 77.0, 44.0

25 years of Energizing India
25 years of Energizing India

Transmission Lines, Sub-stations and X-formation Capacity

One of the world’s Largest Transmission Utilities

(as on 31.03.2014)
106,804 ckm; 186 S/S & 213,819 MVA
25 years of Building Assets & Creating Wealth

Gross Fixed Assets, Income & Profit after Tax

- Fastest Growing Electric Utility globally\(^1\)
- 5\(^{th}\) Largest CPSU\(^2\)

1. Based on Platts Top250 Ranking of Global Energy Cos. For 2014
2. As per PSE Survey 2013 of DPE, GoI

- Gross Fixed Assets (31.3.14): ₹ 96,504 cr.
- Income (FY14): ₹ 15,721 cr.
- PAT (FY14): 4,497 cr.
**25 years of Distributing Wealth**

**Dividend**

- IPO/ FPO Investors would not have incurred loss on their investment
- Aggregate Dividend paid since listing: ₹ 13.09 per share

FY13-14: ₹ 1,350 cr
25 years of Generating Extra Returns for Stakeholders

Consultancy & Telecom

Footprints in 18 countries

- Consultancy Income (FY14) : ₹ 627 cr.
- Telecom Income (FY14) : ₹ 276 cr.
25 years of Optimizing Resources

Inter-Regional Power Transfer &
Short Term Open Access

One of the Largest power grids operating at single frequency in the world

- Inter-Regional Power Transfer:
  - 78 BU
- STOA (No. of transactions):
  - ~ 34,000
- STOA (Energy transacted):
  - 87 BU
25 years of Employee Efficiency

Employee Efficiency

Ranked 7th in Terms of Profit per Employee

- Employees (as on 31.3.2014): 8,694
- ckm per Employee (as on 31.3.2014): 11.7
- Profit After Tax per Employee (FY14): ₹ 51.7 lakh

1 - As per Businessworld BW Real500 rankings (Oct 2011 issue)
25 years of Growth – A Summary

- Manpower
- ckm
- S/S
- MVA
- Profit after Tax
- Gross Fixed Assets
- Income
- Inter-Regional Power Transfer

Amalgamation Phase

IX Plan - Consolidation Phase

X Plan - Growth Phase

XI Plan - Growth Phase

XII Plan - Growth Phase
POWERGRID Today

A ‘NAVRATNA’ ENTERPRISE
CENTRAL TRANSMISSION UTILITY
LISTED COMPANY since 2007
GOVT. SHAREHOLDING 57.90%
PAYING DIVIDEND SINCE 1993-94

Vision
World Class, Integrated, Global Transmission Company With Dominant Leadership in Emerging Power Markets Ensuring Reliability, Safety and Economy

Tr. Lines (as on 10-11-2014)

111,741 ckm
917 Nos.

MVA & S/S (as on 10-11-2014)

218,134 MVA
186 Nos.

Operating Parameters (H1FY15)

Availability: 99.89%
Reliability(*): 0.34

CREDIT RATINGS

Domestic
• AAA Stable CRISIL
• AAA Stable ICRA
• AAA Stable CARE

International
• AAA Stable S&P
• BBB (−) Stable Outlook Fitch
• BBB (−) Stable Outlook ICRA
• AAA Stable CARE

(*) Trippings/line
# Financial Highlights - Q2FY15

<table>
<thead>
<tr>
<th></th>
<th>Quarter ended</th>
<th>Half year ended</th>
<th>FY 2013-14</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revenue</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Transmission Charges</td>
<td>4055</td>
<td>3713</td>
<td>7871</td>
</tr>
<tr>
<td>- Consultancy Income- Services</td>
<td>61</td>
<td>56</td>
<td>122</td>
</tr>
<tr>
<td>- Consultancy Revenue – Sale of Products</td>
<td>0</td>
<td>157</td>
<td>0</td>
</tr>
<tr>
<td>- Telecom</td>
<td>62</td>
<td>73</td>
<td>127</td>
</tr>
<tr>
<td>- Other Income</td>
<td>131</td>
<td>105</td>
<td>264</td>
</tr>
<tr>
<td><strong>Total Income</strong></td>
<td>4309</td>
<td>4104</td>
<td>8384</td>
</tr>
<tr>
<td><strong>Operating Expenses(including prior period adjustment)</strong></td>
<td>598</td>
<td>617</td>
<td>1167</td>
</tr>
<tr>
<td><strong>EBITDA-Gross Margin</strong></td>
<td>3711</td>
<td>3487</td>
<td>7217</td>
</tr>
<tr>
<td>Depreciation</td>
<td>1212</td>
<td>966</td>
<td>2367</td>
</tr>
<tr>
<td>Interest</td>
<td>989</td>
<td>801</td>
<td>1917</td>
</tr>
<tr>
<td>Tax</td>
<td>309</td>
<td>481</td>
<td>595</td>
</tr>
<tr>
<td><strong>Profit after Tax</strong></td>
<td>1201</td>
<td>1239</td>
<td>2338</td>
</tr>
</tbody>
</table>
## Financial Highlights - Q2FY15

<table>
<thead>
<tr>
<th>(₹ in crore)</th>
<th>As on 31.03.2014</th>
<th>As on 30.06.2014</th>
<th>As on 30.09.2014</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Gross Fixed Assets</strong></td>
<td>96,504</td>
<td>101,382</td>
<td>106,085</td>
</tr>
<tr>
<td>Capital Work-in-Progress</td>
<td>53,330</td>
<td>53,345</td>
<td>54,827</td>
</tr>
<tr>
<td><strong>Debt</strong></td>
<td>80,470</td>
<td>84,685</td>
<td>88,110</td>
</tr>
<tr>
<td><strong>Net Worth</strong></td>
<td>34,413</td>
<td>35,526</td>
<td>36,753</td>
</tr>
<tr>
<td><strong>Earning Per Share (Rs)</strong></td>
<td>9.36</td>
<td>2.17*</td>
<td>4.47*</td>
</tr>
<tr>
<td><strong>Book Value per Share (Rs)</strong></td>
<td>65.78</td>
<td>67.91</td>
<td>70.25</td>
</tr>
<tr>
<td><strong>Key Financial Ratios</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Debt : Equity</td>
<td>70:30</td>
<td>70:30</td>
<td>70.6:29.4</td>
</tr>
<tr>
<td>Return on Net Worth</td>
<td>13.07%</td>
<td>3.20%*</td>
<td>6.36%*</td>
</tr>
</tbody>
</table>

* Not Annualised
Billing & Realization

Billing
₹ 7,883 Crore

Realization
₹ 7,444 Crore

%age realization
94.43%

Avg. Monthly Billing: ₹ 1,314 Crore => 2 months (60 days) billing = ₹ 2,628 crore

Dues as on 05.11.2014

(A) Due < 60 days (not outstanding as 60 days allowed by CERC) = ₹ 1,191 crore

(B) Outstanding > 60 days
333 *

Tied-Up payments (in installments)
133

* Excludes disputes on account of surcharge/bills.

Outstanding equivalent to ~5 days billing
Project Execution – Q2 & H1FY15

<table>
<thead>
<tr>
<th></th>
<th>Q2FY14</th>
<th>Q2FY15</th>
<th>H1FY14</th>
<th>H1FY15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capex</td>
<td>6500</td>
<td>4850</td>
<td>10800</td>
<td>10694</td>
</tr>
<tr>
<td>Capitalization</td>
<td>3557</td>
<td>4703</td>
<td>6507</td>
<td>9581</td>
</tr>
</tbody>
</table>

(Till date FY15)

- Capex: ₹ 12,272 crore
- Capitalization: ~₹ 13,200 crore
Projects in FY15

Transmission Lines
~ 15,000 GW-ckm

Sub-Station
15 Nos.
~ 30,000 MVA

Inter-Regional Capacity
7,300 MW

Major Lines
- Nellore-Thiruvalam
- Bina – Gwalior
- Champa-Raipur, Champa-Dharamjaygarh
- Indore - Vadodara
- Raichur – Kurnool, Nellore - Kurnool
- Rihand – V’chal,
- Jharsuguda – Dharamjaygarh
- Thiruvalam – Sholinganallur
- Annupur - Jabalpur
- Balipara - Bongaigaon
- Satna – Gwalior
- Wardha – Aurangabad, Raipur - Wardha
- V’chal – Satna
- Angul-Jharsuguda
- Gwalior – Jaipur, Jaipur – Bhiwani
- Vijayawada – Nellore, Kurnool – Thiruvalem
- Barh – Gorakhpur
- Raigarh - Champa
- Silchar – Purba Kanchan Bari, Silchar - Imphal
- Salem – Madhugiri, Dharmapuri -Somnahalli
- Sholapur - Pune
- Biswanath Chariyali – Agra (NE-NR/WR Interconnector)
- Meerut - Moga
- Kanpur - Jhatikara

Aggregate ckm: ~10,000 (765kV: >60%)

Sub-stations

- Rangpo (GIS)
- Shahjahanpur
- Mgarwada (GIS)
- Madhugiri
- Salem (Dharmapuri)
- Chaibasa
- Pune (GIS)
- Navi Mumbai (GIS)
- Bareilly
- Vadodara (GIS)
- Champa
- New Melli (GIS)
- Kanpur
- Biswanath Chariyali HVDC
- Agra HVDC

Inter-Regional
- Jharsuguda – Dh’jaygarh (4,200MW)
- Barh - Gorakhpur
- Biswanath Chariyali – Agra (NE-NR/WR Interconnector)

Physical Performance H1FY15
(Till date)

<table>
<thead>
<tr>
<th>Tr. Line:</th>
<th>S/S Nos.</th>
<th>X-fmn. Cap.- MVA: I-R Cap.- MW:</th>
</tr>
</thead>
<tbody>
<tr>
<td>GW-ckm 5,465 (8,590)</td>
<td>2 (3)</td>
<td>7,896 (12,841)</td>
</tr>
</tbody>
</table>

Green font indicates assets commissioned till date
# Operations Highlights – H1FY15

## Assets under Management (as on 30-Sep-2014)

<table>
<thead>
<tr>
<th>Lines</th>
<th>911 Nos. 110,514 ckm</th>
<th>765kV(*): 17% 400kV: 73%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sub-Stations</td>
<td>186 Nos. 213,819 MVA</td>
<td>765kV(*): 21% 400kV: 68%</td>
</tr>
</tbody>
</table>

(*) incl. HVDC & 765kV chgd at 400kV

## Grid Management¹ (POSOCO)

<table>
<thead>
<tr>
<th>IR Energy Trf (BU)</th>
<th>H1FY14</th>
<th>H1FY15</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>37.56</td>
<td>40.85</td>
</tr>
</tbody>
</table>

## Short Term Open Access

**H1FY15**

- Transactions: 19,336 Nos.
- Energy Transacted: 42.51 BU

## Asset Management (Apr14-Sep14)

<table>
<thead>
<tr>
<th>Availability: 99.89%</th>
<th>Reliability: 0.34</th>
<th>NTAMC Operational</th>
</tr>
</thead>
</table>

## New Initiatives in O&M

- Aerial Patrolling - under progress
- Maintenance of transmission lines
  - Using Helicopters
  - Insulated Bucket Trucks

## REC Trading: Q2FY15 Update

<table>
<thead>
<tr>
<th>Regd. Capacity (Sep-14)</th>
<th>4,548 MW (Wind: 50%; Solar PV: 11%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>RECs Issued</td>
<td>28 lakh (Q2FY15) vs 13 lakh (Q2FY14)</td>
</tr>
<tr>
<td>RECs Traded</td>
<td>1.14 lakh (Q2FY15) vs 2.63 lakh (Q2FY14)</td>
</tr>
<tr>
<td>Value of RECs Traded</td>
<td>₹ 24 (Q2FY15) vs ₹ 48 cr. (Q2FY14)</td>
</tr>
<tr>
<td>Aggregate RECs traded (till Sep14)</td>
<td>₹ 1274 crore</td>
</tr>
</tbody>
</table>

Sharp fall in REC trading in Q2FY15 w.r.t. Q2FY14

¹ carried out through Power System Operation Corporation Limited, a wholly owned subsidiary of POWERGRID,
Consultancy Highlights - Q2FY15

**Domestic**

**Q2 Orders**
- Total Nos.: 8
- (Govt. Utilities: 6; Private: 1; Dist. works: 1)
- > 120 Assignments
- Projects worth: ~ ₹15,100 cr. (Bal. Cost)

**Q2 Orders (as on 30-Sep-14)**
- Total Nos.: 3
- (1 new client)
- Under execution

**Recent Orders (after Q2FY14)**
- Comprehensive Scheme: Intra-state and distribution works in Sikkim & Arunachal Pradesh
- XII Plan RGGVY works in 3 Districts in Oct’14 in Odisha
- 400kV & 220kV transmission system of Delhi Transco Ltd.
- Aggregate Project Cost: ₹ 4,700 crore

**International**

**Q2 Orders: (as on 30-Sep-14)**
- Total Nos.: 3
- (1 new client)
- Under execution
- 15 Assignments

**Proposals submitted in Q2FY15**
- 4 new proposals
- 2 new countries approached (Ghana & Indonesia)

**Company seeing traction in Capacity Building works in Asia and Africa**

**Footprints in 18 countries**
Telecom Highlights – Q2FY15

Major Orders

New Clients added: 14 Nos.
- Govt.: 8 Nos.
- Pvt.: 6 Nos.

20 year IRU agreement with a leading Telecom Company
- Aggregate bandwidth requirement: ~ 400 Gbps

Order received from a reputed global IT giant for 2 links

Confidence reposed by Global IT companies

MPLS-VPN

- 4 Orders received in Q2FY15
  - Total 7 orders since commercial launch in Apr’14
  - Company seeing a demand from CPSUs for its MPLS services
  - In-house demand for NTAMC and IT/ERP applications

NKN

- Size: ₹ 6,000 cr.
  - POWERGRID Scope: ₹ 900 crore
  - Project completed & under operation

NOFN

- Size: ₹ 20,000 crore
  - Sanction Letter recd for 4 States- Survey works completed- Estimate: ₹ 3,000 crore
  - Execution commenced for ~ 3300 Gram Panchayats
New Initiatives - Updates

**Energy Efficiency**
- Order received from SAIL for Energy Audit of 2 Plants
  - Audit completed at 1 Plant
- Submitted bids for
  - Energy Audit of three more Steel Plants
  - Distribution Energy Audit in Meghalaya

**Renewable Energy Integration**
- Offshore Wind Energy Company being set up by MNRE
  - POWERGRID to join
  - Evacuation/ integration of wind power with National Grid

Exploring installation of Solar Power Plants to utilize earth electrode stn. land of HVDC terminals

- JV with Bihar for Intra-State Transmission (Bihar Grid Co. Ltd.) - ₹ 1600 crore worth projects commenced
- Formation of JV company with Rashtriya Ispat Nigam Limited (RINL) for setting up manufacturing facility for Transmission Line Towers & Tower Parts - Approved
Investment & Funding Programme

**Projects/ Schemes**
- HCPTCs
- Generation linked
- Grid Strengthening
- Green Energy Corridors
- TBCB projects
- JVs with States

**Capital Outlay**
(Rs.110,000 crore)
- FY13: Rs.20,037 cr
- FY14: Rs.22,324 cr
- FY15: Rs.22,450 cr
- FY16: Rs.22,500 cr
- FY17: Rs.22,550 cr

**Funding Requirement**
- Debt & Equity in the ratio 70:30 as per Tariff guidelines

**Sources of Funds**
- **Equity**: Internal Accruals, FPO (2013)
- **Debt**: Domestic Bonds/ Loans, Intl: Loans from WB, ADB; Suppliers’ Credit; ECB

**Investment Approved** - ~ ₹ 101,800 crore

**Debt**: ~ Rs.60,000 crore tied up
Utilization of FPO funds - Update

FPO funds

- Funds raised: ₹ 5321 crore
- No. of Projects identified for fund utilization: 27
- Funds utilized till Oct14: ~ ₹ 3,321 crore
- ~ 41 elements of 16 identified projects commissioned during Dec13 – Oct14

☑ TS associated with Rihand-III & V’chal-IV
☑ TS for Phase-I Generation Projects in Odisha (Part-C)
☑ SRSS – XIX
☑ TS strengthening in western part of WR for IPPs in Chhattisgarh
☑ TS associated with Krishnapatnam (Part-B)
☑ Common System associated with ISGS Projects in Krishnapatnam area of Andhra Pradesh
☑ Establishment of Pooling Stations at Champa and Raigarh (near Tamnar) for IPP generation projects in Chhattisgarh
☑ Establishment of Pooling Stations at Raigarh (Kotra) and Raipur for IPP generation projects in Chhattisgarh
☑ SRSS – XVIII
☑ TS for Phase-I generation projects in Odisha (Part-A)
☑ TS for IPP generation projects in MP & Chhattisgarh
☑ Integration of Pooling Stations in Chhattisgarh with central part of WR for IPP Generation Projects at Chhattisgarh
☑ TS for Phase-I generation projects in Odisha (Part-B)
☑ NRSS – XXI
☑ TS for establishment of 400/220kV GIS sub-station at Magarwada in UT Daman & Diu
☑ TS for transfer of power from generation projects in Sikkim to NR/WR – Part B
## Make in India & Swachh Bharat

<table>
<thead>
<tr>
<th>Category</th>
<th>Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>SVC &amp; STATCOM Packages</td>
<td>At least one SVC/STATCOM to be sourced from India</td>
</tr>
<tr>
<td>765kV Class Transformer/Reactor</td>
<td>Foreign bidders to supply at least one Transformer/Reactor from India</td>
</tr>
<tr>
<td>GIS Equipment</td>
<td>400kV: Indian subsidiaries of MNCs may also supply from their Indian Factories&lt;br&gt;765kV: Bidders to set up manufacturing facilities in India</td>
</tr>
<tr>
<td>HTLS Conductors, OPGW &amp; HVDC</td>
<td>Thrust on Indigenization/ Indian collaboration</td>
</tr>
</tbody>
</table>

### Swachh Bharat
- **Outlay under CSR**: ₹ 108 crore for building >9000 toilets by August, 2015
Thank You