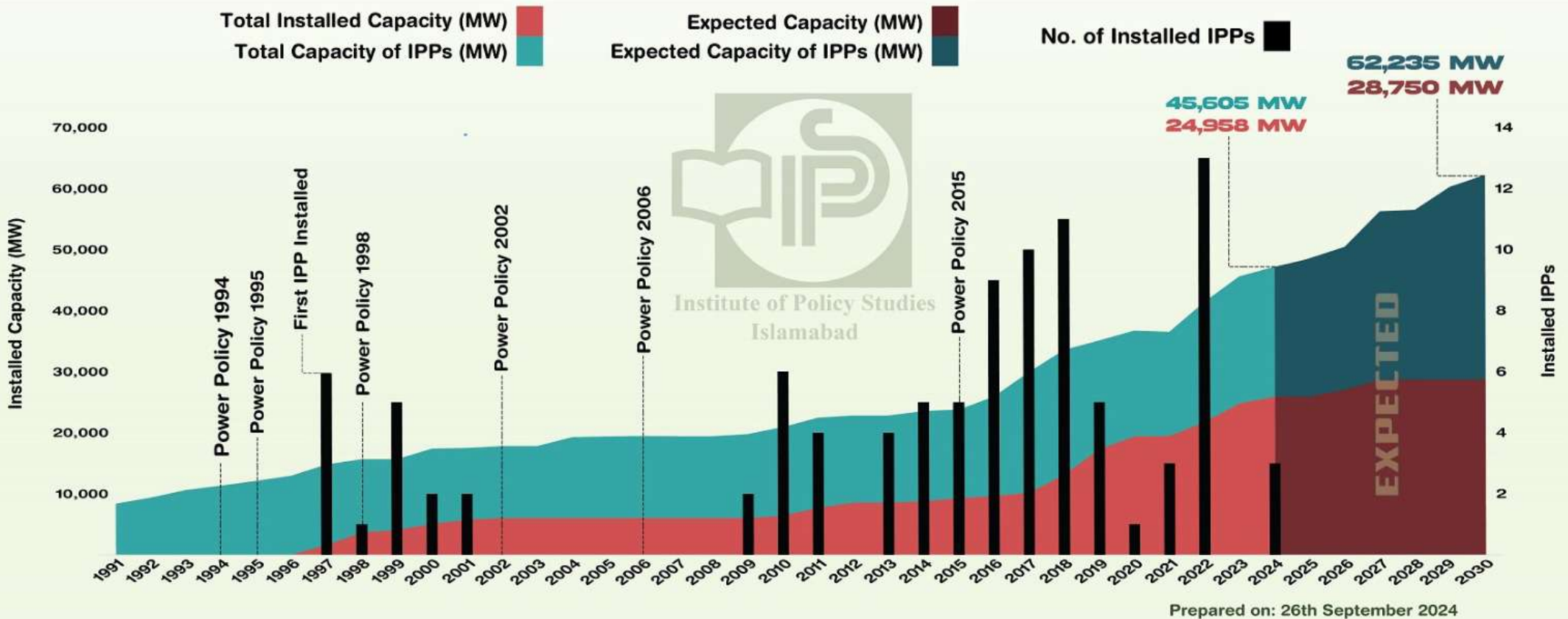


Additions and Projections: Plans till 2030



Upcoming IPPs By 2030

Suki Kinari HP	884 MW	2024
Shah Taj Sugar Mills	32MW	
Tay Powergen (Pvt) Ltd	30 MW	2025
Zorlu Solar Pak Ltd	100 MW	
300MW Coal Based	300 MW	
Safe Solar Pak (Pvt) Ltd	10.27 MW	
Access Solar (Pvt) Ltd	11.52 MW	
Access Electric (Pvt) Ltd	10 MW	2026
Riali-II HPP	7.08 MW	
Kathai-II HPP	8 MW	
Siachin Energy Ltd	100 MW	2027
Western Energy (Pvt) Ltd	50 MW	
Transatlantic Energy (Pvt) Ltd	50 MW	
Oracle Power Project	1,320 MW	
Tutonas-Uzghor HPP	82.25 MW	2029

2,995 MW

Point To Ponder



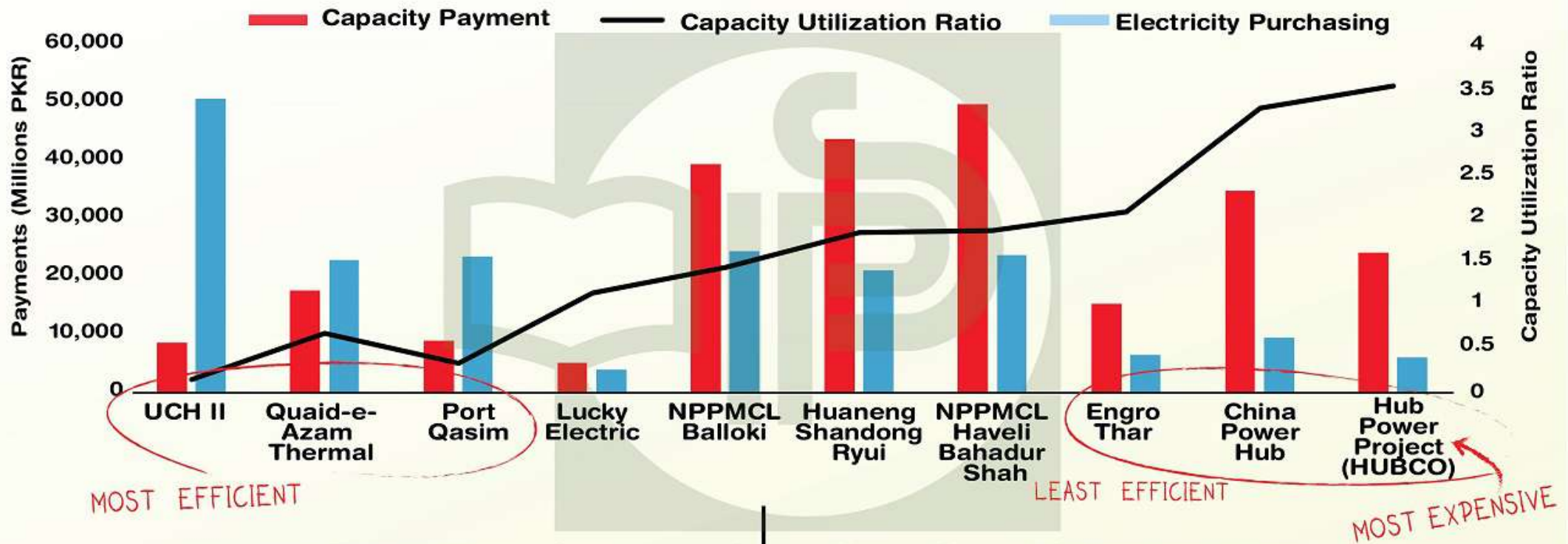
- 1 Additional 3,000 MW is expected to be added to the system through various IPP projects by 2030.
- 2 Despite of having higher installed capacity than demand, what is the purpose of adding more plants in our system?
- 3 If necessary, the Contracts with upcoming IPPs should be government-centric to avoid past inefficiencies.

Prepared on: 26th September 2024

Sources

PPIB, NEPRA IPPs Generation Licenses

Top 10 IPPs Fueling Pakistan's Circular Debt Crisis



Key Takeaways

- 1 These IPPs contribute to 25% of Pakistan's total circular debt.
- 2 Quaid I Azam Thermal, Port Qasim, and UCH II have delivered more electricity compared to other debt-generating IPPs.

Recommendations

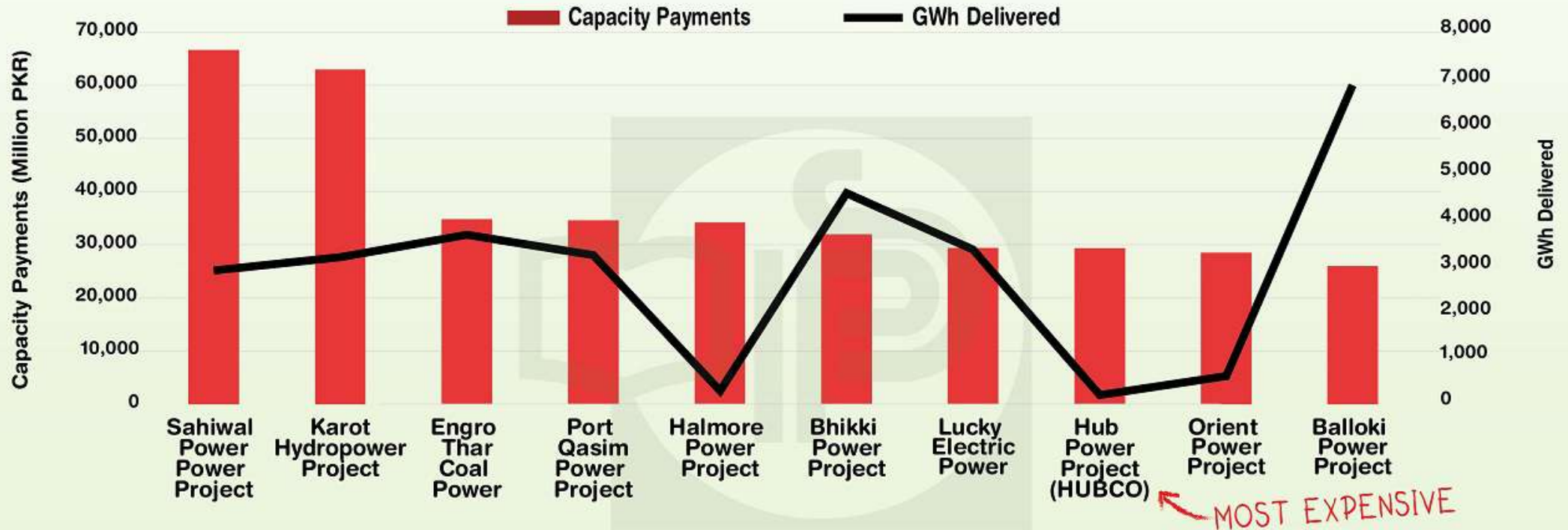
- 1 Renegotiations with IPPs that demonstrate low efficiency should be initiated by the government aiming to improve their performance and reduce costs.
- 2 The government should focus on increasing electricity purchases from plants that are subject to heavy capacity payments.

Prepared on: 26th September 2024

Sources: PPIB, NEPRA State of Industry Report.

Who's Charging the Most?

Top 10 IPPs by Capacity Payments



Key Takeaways

- 40% of total capacity payments are directed to these power plants.
- Halmore, HUBCO, and Orient Power have delivered less electricity yet received heavy capacity payments.

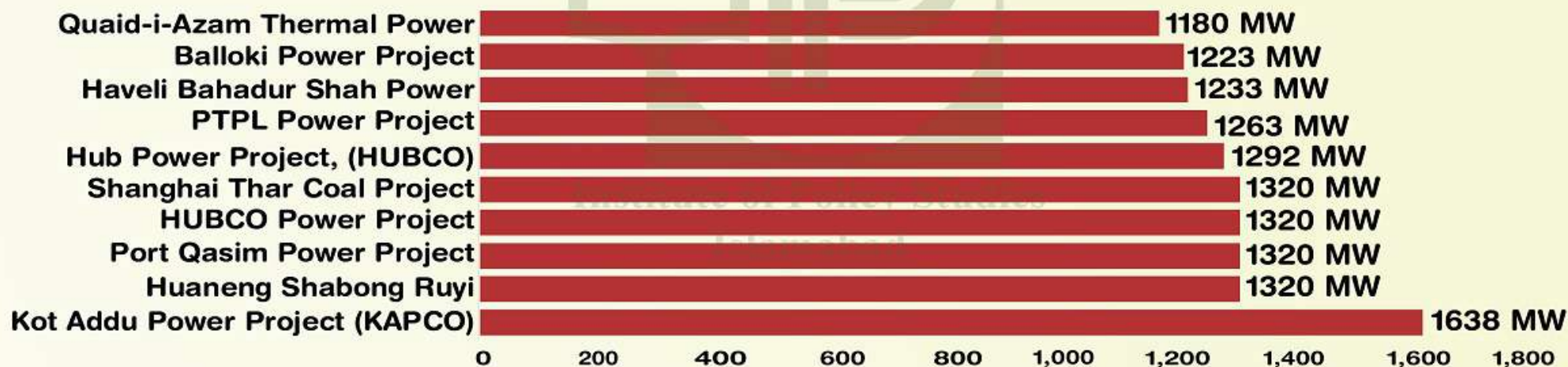
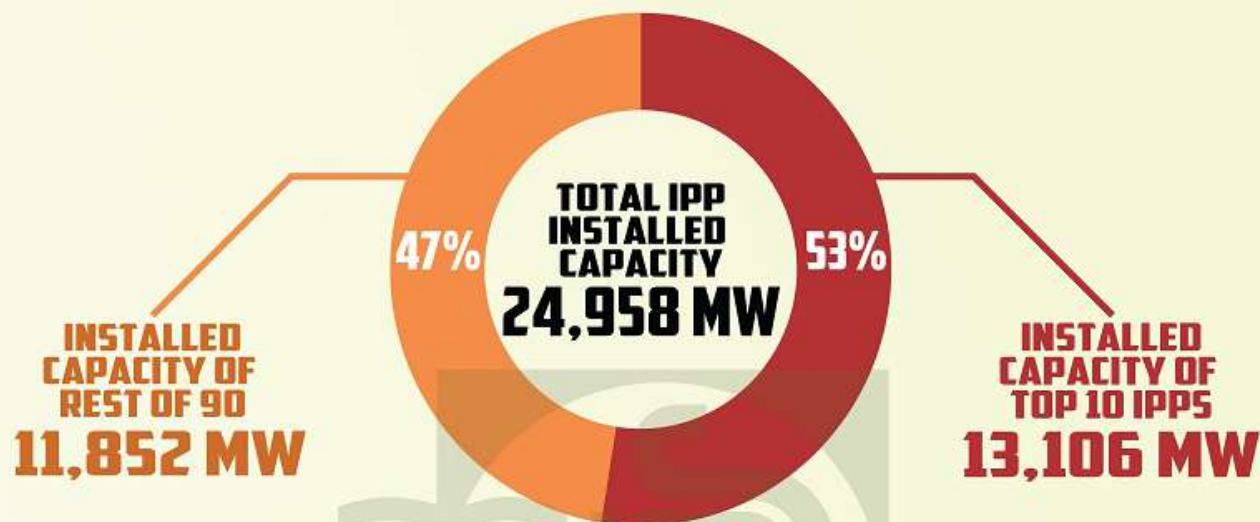
Recommendations

- The government should prioritize sourcing electricity from power plants that deliver higher units of electricity with lower capacity payments
- Immediate action should be taken to renegotiate contracts with power plants that are delivering minimal amounts of electricity, to optimize their operational efficiency and financial viability.

Prepared on: 26th September 2024

Sources: PPIB, NEPRA State of Industry Report, Muhammad Ali Report 2020

Power Giants: The Top 10 IPPs by Installed Capacity



Prepared on: 26th September 2024

Sources: PPIB, NEPRA State of Industry Report 2023



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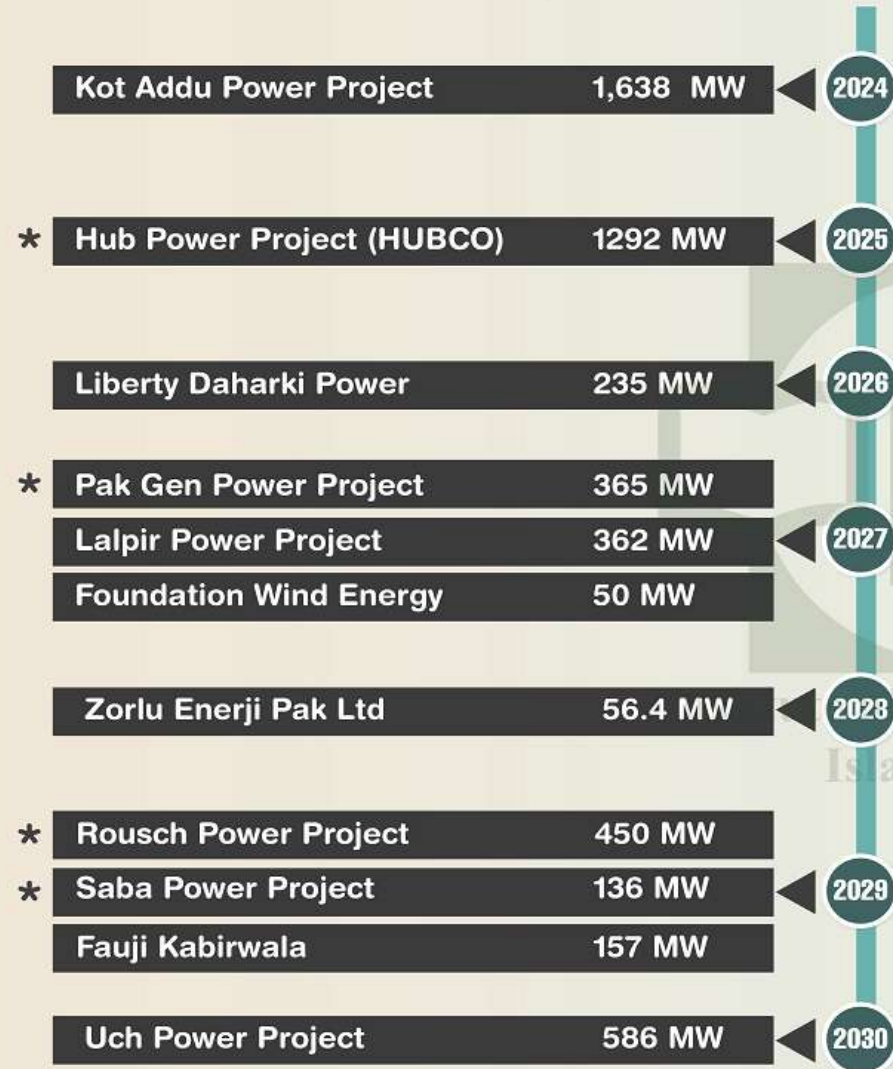
IPS-Islamabad



IPSTV

Data: As of 30th June 2023

Expiring IPPs by 2030



5,327 MW

Point To Ponder



- 1 Approximately 5,300 MW of power will be retired from the system by 2030.
 - 2 The government should refrain from renegotiating contracts of expiring IPPs
 - 3 If adjustments are deemed necessary, the government should focus on converting existing contracts to a "Take and Pay" model
- * These IPPs including Atlas Power (Expiring in 2034) have signed initial documents to terminate their contract.

Prepared on 26th September 2024
Revised on 10th October 2024

Sources

PPIB, NEPRA IPPs Generation Licenses

The IPP Landscape: Visualizing Pakistan's Private Energy Sector

Introduction

► What is an IPP:

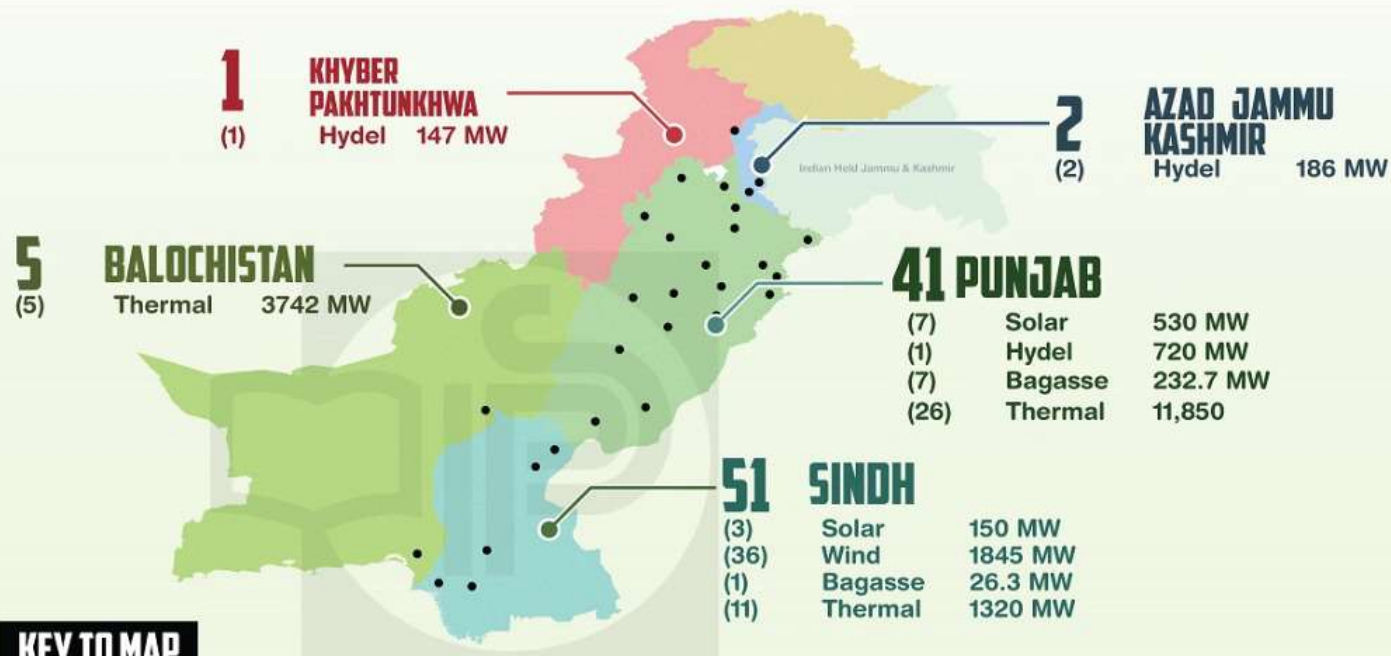
An Independent Power Producer (IPP) is a private entity that generates electricity for sale to the national grid or large consumers, operating independently of government utilities.

► 1st IPP: HUBCO

- 1st Private Power Generation Policy: 1994
- Contract type: Take or Pay
- Total No. of IPPs: 100
- Total Installed Capacity: 45,605 MW
- Total Capacity of IPPs: 24,958 MW



In the current energy sector IPPs hold a 55% share of the installed capacity, while the government's share is 45%, reflecting the growing dominance of private investment alongside state-run entities.



KEY TO MAP

TOTAL NO. OF IPPS

(No of IPPs per fuel type) Fuel Type Installed Capacity

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Prepared on 26th September 2024

Sources: PPIB, NEPRA State of Industry Report, Muhammad Ali Report 2020



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IPSTV

Data: As of 30 June 2024

Mapping IPPs Across Pakistan

- ▶ **The IPP Landscape: Visualizing Pakistan's Private Energy Sector**
- ▶ **Expiring IPPs by 2030**
- ▶ **Power Giants: Top 10 IPPs by Installed Capacity**
- ▶ **Who's Charging the Most? Top 10 IPPs by Capacity Payments**
- ▶ **Top 10 IPPs Fueling Pakistan's Circular Debt**
- ▶ **Upcoming IPPs by 2030**
- ▶ **Additions and Projections: Plans till 2030**

Prepared on: 26th September 2024



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