

# GLOBAL UTILITY TRANSMISSION INVESTMENT REPORT, 2019-2028

**Global Transmission Research** has launched its second edition of the Global Utility Transmission Investment Report. The report will examine capital expenditure (capex) trends over the last ten years and provide a detailed analysis of the planned capex or expected investment by 2028 in the transmission sectors of about 75 countries across the globe. This analysis will cover capex or investment for both new build and renovation and modernisation as well as line-related and station-related investments.

The report will comprise four distinct sections.

**Part 1** will provide the executive summary of the report.

**Part 2** will provide an analysis of the past and future investments at a global level. It will examine trends in utilities' past investment by type and region. It will also capture the key drivers for future investment and analyse plans by type and region. It will also discuss the focus areas of utility plans. There will also be a section on factors and disruptive forces impacting transmission investment. The report will also provide recent trends in transmission financing.

**Part 3** will provide an analysis of the historical and future capital expenditure trends for 75 countries. These countries are organised into six regions: North America, Latin America, Asia, Europe, Middle East and Africa. Each section on the six regions will begin with a regional analysis on the historical and future capital expenditure and key expected investment drivers in that region.

Each regional and country profile will contain the following analysis:

- Historical capex trends
- Expected investment by type
  - New build
  - Renovation and modernisation or rebuild
  - Line-related (conductors, towers, poles, etc.)
  - Station-related (substations, transformers, etc.)
  - Others (IT, communications, smart grid, etc.)
- Key initiatives and programmes

**Part 4** will comprise the appendix. It will include a note on sources and methodology and list of acronyms.

This report is indispensable for any organisation interested in the global high voltage transmission industry - utilities, system operators, equipment manufacturers and suppliers, EPC contractors, service and technology providers, investors/lenders, research organisations, industry consultants, regulatory agencies, development institutions, etc.

The report will be available in a Power Point presentation and Excel database format. It is priced at USD5,500.

There is also a special "early bird" discount price of USD3,850 (30 per cent discount) for orders and payments received on or before April 5, 2019, of USD4,400 (20 per cent discount) for orders and payments received on or before April 30, 2019 and of USD4,950 (10 per cent discount) for orders and payments received on or before May 31, 2019.

The report will be released in the last week of June 2019.

For subscriptions, please contact:

## Americas

Yasmeen Chopra

Mobile: +1 905 228 6419

E-mail: [Yasmeen.Chopra@globaltransmission.info](mailto:Yasmeen.Chopra@globaltransmission.info)

## Rest of the world

Shruti Kumar

Mobile: +91 8447528984

E-mail: [Shruti.Kumar@globaltransmission.info](mailto:Shruti.Kumar@globaltransmission.info)

Website: [www.globaltransmission.info](http://www.globaltransmission.info)

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## Part 2: Transmission investment analysis, past and future

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- Key trends in utilities' past investment
- Trends and analysis of historical capital expenditure by type (new build, refurbishment, etc.)
- Trends and analysis of historical expenditure by region
- Review of big spend markets so far

### 2.2 Future investment analysis

- Key drivers for transmission investment over next ten years
- Analysis of utility investment plans by type (new build, refurbishment, substations, lines, ITC, etc.)
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- Key priorities of utilities
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- Recent trends in financing
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## Part 3: Regional and country-wise investment plans (~75 countries)

Note: each region and country profile will contain the following analysis

- Historical capex trends
- Expected investment by type
- New build
- Renovation and modernisation or rebuild

- Lines-related (conductors, towers, poles, etc.)
- Stations-related (substations, transformers, etc.)
- Others (IT, communications, smart grid, etc.)
- Key initiatives and programmes

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## Part 4: Appendix

- Sources and methodology
- List of acronyms

## Sources and Methodology

Global Transmission Research's industry analysts will utilise various primary and secondary research sources in preparing this report. Primary sources include data and statistics obtained through telephone and email questionnaires sent to various utilities, transmission companies, transmission system operators and industry regulators.

Extensive secondary research will be conducted by our analysts and research associates. These secondary sources will include, but will not be limited to, websites of utilities; annual reports and financial reports of utilities; investor presentations; analyst reports; government documents, plans and statistical databases; websites of relevant ministries and regulators; websites of relevant industry associations; internal and external proprietary databases; news articles; and press reports. Wherever applicable, all research sources are appropriately cited within this report.

These primary and secondary research sources, combined with our industry expertise, will be synthesised into the qualitative and quantitative analysis which will be presented in this report. The historical capex data will be actual figures obtained from the concerned utilities and ministries. In a few cases, where this data is not available, we will use estimates based on information obtained from press reports or those based on past growth trends. For analysis of the expected investment, we will extensively research the plan documents of various utilities and governments. Wherever these plans were not available, we will derive the projections based on past growth trends or based on projects planned by the utilities.

Great care will be taken to ensure that all analysis is well supported by facts. Where facts are not available and assumptions are made, we will explain our assumptions and our methods of estimation.

## About the Publishers

Global Transmission Research is a leading provider of information and analysis on the global electricity transmission industry. We publish newsletters and reports. We also organise conferences on crucial issues and topical themes relevant to the transmission industry.

We publish the Global Transmission Report (a monthly newsletter) and Global Transmission Weekly (a weekly update). We also operate the website [www.globaltransmission.info](http://www.globaltransmission.info). These products and services provide information on all the key developments, trends and issues in the sector.

We have published several industry-focused research studies such as Global Electricity Transmission Report, Global High Voltage Transmission Line Projects Report, Global Electricity Transmission Equipment Market Report, Global Electricity TSO Profiles Report, etc.

## Our Clients

Our clients include leading industry players across the world, both operators and technology providers such as **ABB, Acier Profilé SBB Inc., AIC-USA, Alberta Electric, Alstom, AltaLink, AMEC, AREVA, ASTER, Axpo AG, Balfour Beatty, BCG, Brookfield, CIMA+, Copperbelt Energy, Crompton Greaves, CTEEP, Doble Engineering, Dow Chemicals, EDF, EFACEC Energia SA, EirGrid, Elia Engineering, Enginet, Energostroylnadka, Eskom, European Investment Bank, G&W Electric, GE Energy, Global Insulator Group, Hatch, HSP Hochspannungsgeräte GmbH, Hyosung, ILJIN Electric Co., International Energy Agency, Interconexion Eléctrica, Israel Electric, KEC International, LOCWELD, Maxwell Technologies, Micafil, Mott MacDonald, Nexans, Nexant, PFISTERER, PJM Interconnection, Powergrid, Pöyry Energy, PPC Insulators, RED ELECTRICA ESPAÑA, Reliance Energy, Richard Bergner Elektroarmaturen, RTE, SCLE SFE, Shanghai (MWB), Siemens, SNC Lavalin, SO UPS JSC, Statnett, Sterlite, Suez-Tractebel, Suzlon, Swissgrid AG, Tata Power, Terna, Teshmont, Tesmec S.P.A., TradeWind Energy, Trench Group, Vattenfall, WORLDENERGY SA and Xcel Energy.**

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## Contact Details

### Americas

Yasmeen Chopra

Mobile: +1 905 228 6419

E-mail: [Yasmeen.Chopra@globaltransmission.info](mailto:Yasmeen.Chopra@globaltransmission.info)

### Rest of the world

Shruti Kumar

Mobile: +91 8447528984

E-mail: [Shruti.Kumar@globaltransmission.info](mailto:Shruti.Kumar@globaltransmission.info)

Website: [www.globaltransmission.info](http://www.globaltransmission.info)