



PRIVATE PARTICIPATION AND PPP OPPORTUNITIES IN POWER TRANSMISSION

The global electricity transmission sector is poised for significant growth over the next decade, mainly driven by the need to connect upcoming generation facilities and improve electricity access. While state-backed utilities are gearing up to meet the grid expansion challenge, governments are putting in place stimulating policy measures and right regulatory initiatives to improve the investment environment to promote private participation. It is expected that the global power transmission market will provide investment opportunities worth billions of dollars to the private sector over the next few years. The attractive and stable returns offered by these regulated assets have made the public-private partnership (PPP) landscape extremely competitive.

The Private Participation and PPP Opportunities in Power Transmission report analyses the expected opportunities for private participation and PPP in the transmission sector. It profiles key players dominant in this space, besides profiling 21 countries where such opportunities are available or are expected to be available in the near future.

The report has two distinct sections, and is presented in PowerPoint (in PDF) and Excel database formats. Data and analysis is presented through insightful graphs, figures and tables.

Part 1 of the report provides a global analysis on private participation and PPP in power transmission. It has seven distinct sections.

- Private participation and PPP - models and routes
- Recent developments
- Experience so far
- Bidding and evaluation process
- Private participation and PPP opportunities and prospects
- Issues and challenges
- Competitive landscape (~45 companies)

Part 2 of the report provides profiles of countries where private participation and PPP opportunities exist or are planned or are expected to come up in the near future. 21 countries have been profiled under this section.

- Each country profile provides data and analysis on:
 - The electricity market structure
- Snapshot of the electricity market
 - Growth in generation capacity and production, 2008-17
 - Growth in electricity consumption, 2008-17
 - Growth in line length and transformer capacity, 2008-17

- Institutional and regulatory structure
- Key players in transmission
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- Key features of PPP tender and contract
- Recent experience in private participation and PPP in transmission
 - Overview
 - Project award analysis, by line length and investment
- Expected growth in the electricity sector
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 - Expected growth in consumption, 2018-27
 - Expected growth in transmission network, 2018-27
- Private participation and PPP opportunities in transmission
 - Overview
 - Project pipeline
 - Expected investment
 - List of key projects to be auctioned
- Contacts of key agencies and authorities

The report is priced at USD6,000.

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EXECUTIVE SUMMARY

The global electricity transmission sector is poised for significant growth over the next decade, mainly driven by the need to connect upcoming generation facilities and improve electricity access. While state-backed utilities are gearing up to meet the grid expansion challenge, governments are putting in place stimulating policy measures and right regulatory initiatives to improve the investment environment to promote private participation. This report highlights the emerging public-private partnership (PPP) and private participation opportunities in power transmission. The report also profiles key countries where such opportunities are available or expected in the near future.

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PART II: COUNTRY PROFILES (21 COUNTRIES)

This section of the report profiles countries where PPP and private participation opportunities exist or are planned or are expected to come up in the near future. The profile provides a holistic view of the country's electricity sector and highlight the expected PPP and private participation opportunities in power transmission. Each country profile provides data and analysis on:

- ❖ Electricity market structure
- ❖ Snapshot of electricity market
 - Growth in generation capacity and production, 2008-17
 - Growth in electricity consumption, 2008-17
 - Growth in line length and transformer capacity, 2008-17
- ❖ Institutional and regulatory structure
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- ❖ Contacts of key agencies and authorities

Sources and Methodology

Global Transmission Research's industry analysts have utilised various primary and secondary research sources in preparing this report. Primary sources include information obtained through email questionnaires sent to key state-owned transmission utilities, private transmission developers and investors, and industry regulators. Extensive secondary research has been conducted by our analysts and research associates. These secondary sources include, but are not limited to, websites of both public utilities and private developers; annual reports and financial reports of these companies; 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 have been appropriately cited within this report. These primary and secondary research sources, combined with our industry expertise, have been synthesised into qualitative and quantitative analysis, which has been presented in this report.

The data and statistics for the years 2008 to 2017 are actual figures obtained from the concerned utilities, regulatory authorities and ministries. In a few cases, where data is not yet available, we have used estimates based on information obtained from press reports or those based on past growth trends. For expected addition to generation and transmission capacity, we have extensively researched the plan documents of various utilities and governments. Wherever these plans are not available, we have derived the projections based on past growth trends or based on new projects planned by the utilities.

Great care has been taken to ensure that all analysis is well supported by facts. Where facts were not available and assumptions are made, we have explained our assumptions and our methods of estimation.

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