

Table of Contents

PART I		PART II	
GLOBAL ELECTRICITY DISTRIBUTION INDUSTRY	12	REGIONAL AND COUNTRY-LEVEL ANALYSIS	53
1.1 Executive summary	13	2.1 North America	54
1.2 Growth in distribution system by region, 2008-17		2.1.1 Regional analysis	55
1.2.1 Consumption/sales mix and growth	15	2.1.2 Canada	70
1.2.2 Growth in number of customers	16	2.1.3 USA	93
1.2.3 Size and growth in distribution network	17		
1.3 Trends in operational performance by region, 2008-17		2.2 Latin America	126
1.3.1 Distribution network losses	18	2.2.1 Regional analysis	127
1.3.2 SAIFI and SAIDI Indices	19	2.2.2 Argentina	143
1.4 Trends in financial performance by region, 2008-17		2.2.3 Bolivia	169
1.4.1 Trends in revenues from electricity distribution	20	2.2.4 Brazil	189
1.4.2 Trends in capex/investment in distribution network	21	2.2.5 Chile	215
1.5 Forecast for growth for the distribution industry, 2018-27		2.2.6 Colombia	239
1.5.1 Expected growth in consumption/sales	22	2.2.7 Costa Rica	262
1.5.2 Expected growth in network size	23	2.2.8 Dominican Republic	281
1.5.3 Expected trends in capex/investment	24	2.2.9 Ecuador	303
1.6 Market and regulatory framework by region	25	2.2.10 Guatemala	324
1.6.1 Ownership structure	26	2.2.11 Honduras	346
1.6.2 Tariff setting mechanism	29	2.2.12 Mexico	360
1.7 Trends in adoption of smart grid technologies in view of:	33	2.2.13 Nicaragua	385
● Renewable energy		2.2.14 Panama	402
● Distributed energy resources		2.2.15 Peru	425
● Energy storage		2.2.16 Uruguay	449
● Electric vehicles			
1.8 Trends in metering	40	2.3 Asia Pacific	468
1.8.1 Smart metering	41	2.3.1 Regional analysis	469
1.8.2 Unmetered markets and prepaid metering	43	2.3.2 Australia	486
1.9 Leading DSOs	44	2.3.3 Bangladesh	508
1.10 Outlook and opportunities		2.3.4 Cambodia	526
1.10.1 Expected opportunities for investors	49	2.3.5 China	545
1.10.2 Opportunities for equipment suppliers	50	2.3.6 India	571

Table of Contents

2.3.7	Indonesia	607	2.4.22	Spain	1,260
2.3.8	Japan	626	2.4.23	Sweden	1,280
2.3.9	Kazakhstan	647	2.4.24	Turkey	1,306
2.3.10	Malaysia	662	2.4.25	United Kingdom	1,341
2.3.11	Myanmar	685	2.4.26	Ukraine	1,370
2.3.12	Nepal	703			
2.3.13	Pakistan	718	2.5	Middle East	1,386
2.3.14	Philippines	738	2.5.1	Regional analysis	1,387
2.3.15	Sri Lanka	757	2.5.2	Oman	1,403
2.3.16	Thailand	783	2.5.3	Qatar	1,428
2.3.17	Vietnam	802	2.5.4	Saudi Arabia	1,444
			2.5.5	United Arab Emirates	1,464
2.4	Europe	822	2.6	Africa	1,486
2.4.1	Regional analysis	823	2.6.1	Regional analysis	1,487
2.4.2	Austria	842	2.6.2	Algeria	1,504
2.4.3	Belgium	858	2.6.3	Cameroon	1,523
2.4.4	Croatia	878	2.6.4	Egypt	1,539
2.4.5	Czech Republic	896	2.6.5	Ethiopia	1,561
2.4.6	Denmark	915	2.6.6	Ghana	1,575
2.4.7	Estonia	934	2.6.7	Ivory Coast	1,598
2.4.8	Finland	951	2.6.8	Kenya	1,615
2.4.9	France	974	2.6.9	Morocco	1,635
2.4.10	Germany	998	2.6.10	Nigeria	1,652
2.4.11	Greece	1,029	2.6.11	South Africa	1,674
2.4.12	Ireland	1,047	2.6.12	Sudan	1,692
2.4.13	Italy	1,064	2.6.13	Tanzania	1,706
2.4.14	Latvia	1,083	2.6.14	Uganda	1,724
2.4.15	Lithuania	1,101			
2.4.16	Netherlands	1,117			
2.4.17	Norway	1,138	PART 3		
2.4.18	Poland	1,168	APPENDIX		1,744
2.4.19	Portugal	1,192			
2.4.20	Romania	1,209	3.1	Sources and methodology	1,745
2.4.21	Russia	1,231	3.2	List of abbreviations	1,746

Table of Contents

Each regional analysis has:

1. Regulatory framework and tariff setting mechanism analysis
2. Consumer mix and growth
3. Consumption/sales mix and growth, 2008-17
4. Growth in distribution network, 2008-17
5. Growth in capex/investment, 2008-17
6. Expected growth in consumption/sales, 2018-27
7. Expected growth in network, 2018-27
8. Expected growth in capex/investment, 2018-27
9. Smart grid and metering trends and plans
10. Outlook and opportunities

Each country profile has information and analysis on:

1. Sector overview

2. Institutional and regulatory structure

- 2.1. Key institutions and players
- 2.2. DSO licensing requirements
- 2.3. Distribution tariff setting mechanism
- 2.4. Key recent policy and regulatory developments

3. Sector size and past growth (2008-17)

- 3.1. Installed capacity
- 3.2. Electricity production
- 3.3. Number of consumers
 - 3.3.1. Growth in number of consumers
 - 3.3.2. Consumers by category
- 3.4. Electricity consumption or sales
 - 3.4.1. Growth in total consumption/sales
 - 3.4.2. Consumption/sales mix by consumer category

4. Size and growth in distribution network (2008-17)

5. Trends in operational performance (2008-17)

- 5.1. Distribution losses
- 5.2. SAIFI/SAIDI Indices

6. Trends in financial performance (2008-17)

- 6.1. Trends in revenues from electricity distribution
- 6.2. Trends in capex/investment in distribution network

7. Smart grid and metering efforts, initiatives, roll-out and targets

8. Forecast and projections (2018-27)

- 8.1. Expected growth in consumption
- 8.2. Network plans and targets
- 8.3. Expected growth in network
- 8.4. Expected capex/investment trends

9. Outlook and opportunities in the sector

10. Inter-DSO comparison (for up to 5 key DSOs)

- 10.1. Ownership
- 10.2. Area of operations
- 10.3. Size and character of operations
 - 10.3.1. Size of distribution network
 - 10.3.2. Number of customers
 - 10.3.3. Customer mix
 - 10.3.4. Energy delivered or carried/sold/distributed
 - 10.3.5. Number of meters/smart meters installed
- 10.4. Operational performance
 - 10.4.1. Network losses
 - 10.4.2. SAIFI
 - 10.4.3. SAIDI
- 10.5. Financial performance
 - 10.5.1. Revenues
 - 10.5.2. Profit/Loss
 - 10.5.3. EBITDA
 - 10.5.4. Debt-Equity ratio
 - 10.5.5. Return on equity
 - 10.5.6. Capex
- 10.6. Future plans
 - 10.6.1. Network expansion
 - 10.6.2. Smart grid
 - 10.6.3. Metering

(The above mentioned data sets have been captured for majority of the countries)