



GLOBAL ELECTRICITY DISTRIBUTION INDUSTRY REPORT 2018-27

The Global Electricity Distribution Industry Report 2018-27 provides information and analysis on the electricity distribution sectors of 75 countries. The report includes the latest statistics on the sector and network size, trends on past capex or investment, data on operational and financial performance, and information on the regulatory framework and tariff-setting mechanism. It also provides forecasts for sector size, network and investment, and will evaluate opportunities for investors and suppliers. In addition, the report highlights trends in metering and adoption of smart technologies in the distribution industry. It also profiles up to five leading distribution system operators (DSOs) in each country.

The report has four distinct sections.

Part 1 of the report provides global industry analysis in terms of sector and network size, operational and financial performance, and capex over the past decade (2008-17). It also provides projections for the coming decade (2018-27). This part also covers trends in metering and adoption of smart technologies. In addition, it examines upcoming opportunities and offers an outlook for the industry.

Part 2 of the report provides detailed profiles of 75 countries. These countries are organised into six regions: North America, Latin America, Asia, Europe, the Middle East and Africa. There is a regional analysis on the key developments, trends and growth opportunities in that region. The report covers two countries in North America, 15 countries in Latin America, 25 countries in Europe, 16 countries in Asia, 13 countries in Africa and 4 countries in the Middle East.

Each country profile contains sector overview; institutional and regulatory structure; growth in network and consumers; trends in operational and financial performance; smart grid and metering initiatives; forecasts for network size and investment; opportunities; outlook; and short profiles of up to top five DSOs.

Part 3 of the report is an Appendix with a list of abbreviations and a note on sources and methodology.

Part 4 of the report is an Excel database with:

- ❖ Detailed data and statistics and projections for each country in a tabular format
- ❖ Operational and financial data on leading DSOs in each country

This report and database are indispensable for any organisation interested in the global electricity distribution 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 is priced at USD6,000.

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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
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9. Smart grid and metering trends and plans
10. Outlook and opportunities

Each country profile has information and analysis on:

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2. Institutional and regulatory structure

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- 2.2. DSO licensing requirements
- 2.3. Distribution tariff setting mechanism
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(The above mentioned data sets have been captured for majority of the countries)

Sources and Methodology

Our analysts have utilised various primary and secondary research sources in preparing this report. Primary sources include data and statistics obtained through email questionnaires sent to key utilities, distribution companies, distribution system operators 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 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 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.

Wherever possible, the data and statistics for the years 2008 to 2017 are actual figures obtained from the concerned utilities, regulatory authorities and ministries. In the cases, where data was not 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 distribution 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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