



# GLOBAL ELECTRICITY DSO PROFILES REPORT 2021

Global Transmission has released the Global Electricity DSO Profiles Report in December 2020. The report provides detailed profiles of around 250 distribution system operators (DSOs) or distribution utilities operating in 74 countries in six regions - North America, Latin America, Asia, Europe, the Middle East and Africa. There is also a profile for each of the 74 countries.

The report will have seven distinct sections.

**Part 1** provides the executive summary of the report.

**Part 2** of the report discusses the key trends in the global electricity distribution sector. It analyses the past growth in electricity sales and network, evaluates the operational and financial performance of DSOs, examines past and future trends in capital expenditure, and highlights the major initiatives and key focus areas of leading DSOs.

**Part 3** of the report compares the growth in distribution line length, electricity sales and customer base of leading DSOs from 2014 to 2019.

**Part 4** of the report compares the operational and financial performance of leading DSOs. The performance of DSOs has been compared on parameters such as distribution losses, SAIFI, SAIDI, revenue from distribution sales and net profit.

**Part 5** of the report analyses the past and future capital expenditure programmes of leading DSOs.

**Part 6** of the report comprises of detailed profiles of leading 250 DSOs across the globe. These DSOs own and operate a major share in the distribution market (in terms of electricity sales) in their respective countries. The section also comprises country profiles of 74 countries - two in North America, 14 in Latin America, 17 in Asia, 24 in Europe, six in the Middle East and 11 in Africa.

The report is available in PDF and Excel formats. It is priced at USD 5,000.

## Americas

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Each DSO profile comprises of the following information and data:

- Size and growth of the distribution network (2014-19)
- Growth in electricity sales and customer base (2014-19)
- Trends in operational performance (2014-19)
  - Distribution losses
  - SAIFI/SAIDI indices
- Trends in financial performance (2014-19)
  - Revenues from electricity distribution
  - Net profit/net income from electricity distribution
  - Capex/investment in the distribution network
- Forecast and projections
  - Network plans and targets
  - Expected capex/investment trends
  - Major focus areas

Each country profile provides:

- A snapshot of recent growth trends in the electricity sector
- An overview of the institutional and regulatory structure and key players
- Data on the expected growth in future consumption

**Part 7** comprises the sources, methodology and a list of abbreviations.

## Rest of the world

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# Table of Contents

<b>PART 1: EXECUTIVE SUMMARY</b>	<b>11</b>		
<b>PART 2: KEY GLOBAL TRENDS</b>	<b>13</b>		
2.1 Growth in electricity sales	14		
2.2 Growth in network	15		
2.3 Trends in operational performance	16		
2.4 Trends in financial performance	18		
2.5 Trends in capital expenditure	19		
2.6 Key initiatives and focus areas	21		
2.7 Trends in future consumption/sales	26		
<b>PART 3: INTER-DSO COMPARISON: NETWORK SIZE AND SALES</b>	<b>27</b>		
3.1 Growth in the distribution network, 2014-19	28		
3.2 Growth in electricity sales, 2014-19	34		
3.3 Growth in the customer base, 2014-19	39		
<b>PART 4: INTER-DSO COMPARISON: OPERATIONAL AND FINANCIAL PERFORMANCE</b>	<b>44</b>		
4.1 Operational performance	45		
4.2 Financial performance	59		
<b>PART 5: INTER-DSO COMPARISON: PAST AND FUTURE CAPEX</b>	<b>71</b>		
5.1 Trend in capital expenditure, 2014-19	72		
5.2 Expected trends in capex/investment	78		
<b>PART 6: DSO AND COUNTRY PROFILES</b>	<b>84</b>		
<b>6.1 North America</b>	<b>85</b>		
6.1.1 Canada	86		
• Country Profile			
• DSO Profiles			
- BC Hydro			
- ENMAX Power Corporation			
- Fortis Alberta			
- Hydro One			
- Hydro-Québec			
- Manitoba Hydro			
- NB Power Corporation			
- Nova Scotia Power Incorporated (NSPI)			
- SaskPower			
6.1.2 USA	98		
• Country Profile			
• DSO Profiles			
- Alabama Power Company			
- Ameren Illinois Company			
- Ameren Missouri (Union Electric Company)			
- Appalachian Power Company			
- Arizona Public Service Company			
- Baltimore Gas & Electric Company			
- City of San Antonio (CPS Energy)			
- Commonwealth Edison Company			
- Consolidated Edison Company NY			
- Consumers Energy Company			
- Dominion Energy South Carolina, LLC			
- DTE Electric Company			
- Duke Energy Carolinas, LLC			
<b>6.2 Latin America</b>	<b>146</b>		
6.2.1 Argentina	147		
• Country Profile			
• DSO Profiles			
- Empresa Distribuidora y Comercializadora Norte SA (Edenor SA)			
- Empresa Distribuidora Sur Sociedad Anónima (Edesur)			
- Empresa Provincial de la Energía de Santa Fe (EPE SF)			
- Empresa Provincial de Energía de Córdoba (EPEC)			
6.2.2 Bolivia	154		
• Country Profile			
• DSO Profiles			
- Cooperativa Rural de Electrificación RL (A.Integrada)			
6.2.3 Brazil	157		
• Country Profile			
• DSO Profiles			
- Cemig Distribuição SA (CEMIG-D)			
- Companhia de Electricidade do Estado da Bahia (COELBA)			
- Companhia Energética de Pernambuco (CELPE)			
- Companhia Energética do Ceará (Enel Distribuição Ceará)			
- Companhia Paulista de Força E Luz (CPFL-PAULISTA)			
- Copel Distribuicao SA (COPEL-DIS)			
- Eletropaulo Metropolitana Eletricidade de São Paulo SA (ELETROPAULO)			
6.2.4 Chile	167		
• Country Profile			
• DSO Profiles			
- Duke Energy Florida, LLC			
- Duke Energy Indiana, LLC			
- Duke Energy Ohio Inc			
- Duke Energy Progress - (NC)			
- Entergy Arkansas LLC			
- Entergy Louisiana LLC			
- Entergy Texas Inc.			
- Florida Power & Light Company			
- Georgia Power Company			
- Indiana Michigan Power Company			
- Kentucky Utilities Company			
- Los Angeles Department of Water & Power			
- MidAmerican Energy Company			
- Nevada Power Company			
- Northern Indiana Pub Service Company			
- Northern States Power Company - Minnesota			
- Ohio Power Company			
- Oklahoma Gas & Electric Company			
- Pacific Gas & Electric Company			
- PacifiCorp			
- PECO Energy Company			
- Portland General Electric Company			
- Public Service Co of Colorado			
- Public Service Co of Oklahoma			
- Public Service Elec & Gas Company			
- Puget Sound Energy Inc			
- San Diego Gas & Electric Company			
- Southern California Edison Company			
- Tampa Electric Company			
- Virginia Electric & Power Company			
- Wisconsin Electric Power Company (We Energies)			

# Table of Contents

	- CGE Distribución S.A. (CGE DISTRIBUCIÓN)		<b>6.3 Asia Pacific</b>	<b>219</b>	
	- Enel Distribución Chile S.A.				
6.2.5	Colombia	172	6.3.1	Australia	220
	● Country Profile			● Country Profile	
	● DSO Profiles			● DSO Profiles	
	- CODENSA			- Ausgrid	
	- Electricaribe			- AusNet (D)	
	- Empresas Públicas de Medellín (EPM)			- Endeavour Energy	
				- Energex	
				- Ergon Energy	
				- Essential Energy	
				- Powercor Australia	
				- SA Power Networks	
				- United Energy	
				- Western Power	
6.2.6	Costa Rica	178	6.3.2	Bangladesh	233
	● Country Profile			● Country Profile	
	● DSO Profiles			● DSO Profiles	
	- Compañía Nacional de Fuerza y Luz (CNFL)			- Bangladesh Power Distribution Board (BPDB)	
	- Instituto Costarricense de Electricidad (ICE)			- Dhaka Electric Supply Company Limited (DESCO)	
				- Rural Electrification Board of Bangladesh (BREB)	
6.2.7	Dominican Republic	183	6.3.3	Cambodia	239
	● Country Profile			● Country Profile	
	● DSO Profiles			● DSO Profiles	
	- Edesur Dominicana, S.A. (EDESUR)			- Electricite Du Cambodge (EDC)	
	- Empresa Distribuidora de Electricidad del Este, S.A. (EDEEste)				
	- Empresa Distribuidora de Electricidad del Norte S.A. (EDENorte)				
6.2.8	Ecuador	189	6.3.4	China	243
	● Country Profile			● Country Profile	
	● DSO Profiles			● DSO Profiles	
	- CNEL-Guayaquil			- China Southern Power Grid (CSG)	
				- State Grid of China Corporation (SGCC)	
6.2.9	Guatemala	193	6.2.5	India	248
	● Country Profile			● Country Profile	
	● DSO Profiles			● DSO Profiles	
	- Empresa Eléctrica de Guatemala, S.A (EEGSA)			- Andhra Pradesh Distribution Company Limited (APDCL)	
				- Andhra Pradesh Eastern Power Distribution Company (APEPDCL)	
				- Andhra Pradesh Southern Power Distribution Company Limited (APSPDCL)	
				- Ajmer Vidyut Vitran Nigam Limited (AVNNL)	
				- Bangalore Electricity Supply Company Limited (BESCOM)	
				- BSES Rajdhani Power Limited (BRPL)	
				- Chhattisgarh State Power Distribution Company Limited (CSPDCL)	
				- Dakshin Gujarat Vij Company Limited (DGVCL)	
				- Kerala State Electricity Board Limited (KSEBL)	
				- Madhya Pradesh Madhya Kshetra Vidyut Vitaran Company (MP Madhya)	
				- Madhya Pradesh Paschim Kshetra Vidyut Vitaran Company Ltd (MP Paschim)	
				- Madhya Pradesh Poorv Kshetra Vidyut Vitaran Company Ltd (MP Poorv)	
				- Maharashtra State Electricity Distribution Company Limited (MSEDCL)	
				- Madhyanchal Vidyut Vitaran Nigam Limited (MVVNL)	
				- Northern Bihar Power Distribution Company Limited (NBPDCCL)	
				- Paschim Gujarat Vij Company Ltd (PGVCL)	
				- Punjab State Power Corporation Limited (PSPCL)	
				- Purvanchal Vidyut Vitaran Nigam Limited (PuVVNL)	
				- Paschimanchal Vidyut Vitaran Nigam Limited (PVVNL)	
				- Southern Bihar Power Distribution Company Limited (SBPDCL)	
				- Tamil Nadu Generation and Distribution Corporation (TANGEDCO)	
				- Northern Power Distribution Company of Telangana Limited (TSNPDCL)	
				- Telangana State Southern Power Distribution Company Limited	
6.2.10	Honduras	197			
	● Country Profile				
	● DSO Profiles				
	- Empresa Nacional de Energía Eléctrica (ENEE)				
6.2.11	Mexico	201			
	● Country Profile				
	● DSO Profiles				
	- Comisión Federal de Electricidad (CFE)				
6.2.12	Panama	205			
	● Country Profile				
	● DSO Profiles				
	- Empresa de Distribucion Electrica Metro-Oeste, SA (EDEMET S A)				
	- ELEKTRA NORESTE, S. A. (ENSA)				
6.2.13	Peru	210			
	● Country Profile				
	● DSO Profiles				
	- Enel Distribución Perú				
	- Luz del Sur				
6.2.14	Uruguay	215			
	● Country Profile				
	● DSO Profiles				
	- Administración Nacional de Usinas y Trasmisiones Eléctricas (UTE)				

# Table of Contents

	(TSSPDCL)				
	- Uttar Gujarat Vij Company Limited (UGVCL)			● Country Profile	
	- West Bengal State Electricity Distribution Company (WBESDCL)			● DSO Profiles	
				- Korea Electric Power Corporation (KEPCO)	
6.2.6	Indonesia	178	6.3.15	Sri Lanka	328
	● Country Profile			● Country Profile	
	● DSO Profiles			● DSO Profiles	
	- PT PLN (Persero)			- Central Electricity Board (CEB)	
6.3.7	Japan	280	6.3.16	Thailand	332
	● Country Profile			● Country Profile	
	● DSO Profiles			● DSO Profiles	
	- Chubu Electric Power Company (Chubu EPCo)			- Metropolitan Electricity Authority (MEA)	
	- Chugoku Electric Power Company (Chugoku EPCo)			- Provincial Electricity Authority (PEA)	
	- Hokkaido Electric Power Company (Hokkaido EPCo)				
	- Hokuriku Electric Power Company (Hokuriku EPCo)		6.3.17	Vietnam	337
	- Kansai Electric Power Company (Kansai EPCo)			● Country Profile	
	- Kyushu Electric Power Company (Kyushu EPCo)			● DSO Profiles	
	- Shikoku Electric Power Company (Shikoku EPCo)			- Electricity of Vietnam (EVN)	
	- Tohoku Electric Power Company (Tohoku EPCo)				
	- Tokyo Electric Power Company (Tokyo EPCo)		<b>6.4</b>	<b>Europe</b>	<b>341</b>
6.3.8	Malaysia	292	6.4.1	Austria	342
	● Country Profile			● Country Profile	
	● DSO Profiles			● DSO Profiles	
	- Sarawak Energy Berhad (SEB)			- Energienetze Steiermark GmbH	
	- Sabah Electricity Sdn. Bhd. (SESB)			- EVN AG	
	- Tenaga Nasional Berhad (TNB)		6.4.2	Belgium	347
6.3.9	Costa Rica	298		● Country Profile	
	● Country Profile			● DSO Profiles	
	● DSO Profiles			- ORES Assets Scrl	
	- Nepal Electricity Authority (NEA)			- RESA S.A	
				- Sibelga Scrl	
6.3.10	New Zealand	302	6.4.3	Croatia	353
	● Country Profile			● Country Profile	
	● DSO Profiles			● DSO Profiles	
	- Powerco			- HEP Operator distribucijskog sustava d.o.o. (HEP ODS)	
	- Vector Lines		6.4.4	Czech Republic	357
6.3.11	Pakistan	307		● Country Profile	
	● Country Profile			● DSO Profiles	
	● DSO Profiles			- CEZ Distribuce, as	
	- Faisalabad Electric Supply Company (FESCO)			- PRE distribuce, as	
	- Gujranwala Electric Power Company (GEPCO)			- Energienetze Steiermark GmbH	
	- Lahore Electricity Supply Company (LESCO)		6.4.5	Denmark	362
	- Multan Electric Power Company (MEPCO)			● Country Profile	
	- Peshawar Electric Supply Company (PESCO)			● DSO Profiles	
6.3.12	Philippines	315		- Cerius A/S	
	● Country Profile		6.4.6	Estonia	366
	● DSO Profiles			● Country Profile	
	- Davao Light and Power Company (DLPC)			● DSO Profiles	
	- Manila Electric Company (MERALCO)			- Elektrilevi OÜ	
	- Visayan Electric Company (VECO)		6.4.7	Finland	370
6.3.13	Singapore	321		● Country Profile	
	● Country Profile			● DSO Profiles	
	● DSO Profiles			- Caruna Networks Oy	
	- SP Group			- Elenia Verkkö Oyj	
6.3.14	South Korea	324			



# Table of Contents

- Western Power Distribution (South Wales) plc			
- Western Power Distribution (South West) plc			
- Western Power Distribution (West Midlands) plc (WMID)			
<b>6.5 Middle East</b>	<b>485</b>		
6.5.1 Bahrain	486		
• Country Profile			
• DSO Profiles			
- Electricity and Water Authority (EWA)			
6.5.2 Kuwait	490		
• Country Profile			
• DSO Profiles			
- Ministry of Electricity and Water (MEW)			
6.5.3 Oman	494		
• Country Profile			
• DSO Profiles			
- Majan Electricity Distribution Company (MJEC)			
- Muscat Electricity Distribution Company (MEDC)			
- Mazoon Electricity Distribution Company (MZEC)			
6.5.4 Qatar	500		
• Country Profile			
• DSO Profiles			
- Qatar General Electricity and Water Corporation (KAHRAMAA)			
6.5.5 Saudi Arabia	504		
• Country Profile			
• DSO Profiles			
- Saudi Electric Company (SEC)			
6.5.6 United Arab Emirates (UAE)	508		
• Country Profile			
• DSO Profiles			
- Abu Dhabi Distribution Company (ADDC)			
- Al Ain Distribution Company (AADC)			
- Dubai Electricity and Water Authority (DEWA)			
- Federal Electricity and Water Authority (FEWA)			
- Sharjah Electricity and Water Authority (SEWA)			
<b>6.6 Africa</b>	<b>516</b>		
6.6.1 Algeria	517		
• Country Profile			
• DSO Profiles			
- Société Nationale de l'Electricité et du Gaz (Sonelgaz)			
6.6.2 Cameroon	521		
• Country Profile			
• DSO Profiles			
- ENEC			
6.6.3 Egypt	525		
• Country Profile			
• DSO Profiles			
- Egyptian Electricity Holding Company (EEHC)			
6.6.4 Ghana	529		
• Country Profile			
• DSO Profiles			
- Electricity Company of Ghana (ECG)			
6.6.5 Ivory Coast	533		
• Country Profile			
• DSO Profiles			
- Compagnie Ivoirienne d'Electricité (CIE)			
6.6.6 Kenya	537		
• Country Profile			
• DSO Profiles			
- Kenya Power			
6.6.7 Morocco	541		
• Country Profile			
• DSO Profiles			
- Office National de l'Electricité et de l'Eau Potable (ONEE)			
6.6.8 South Africa	545		
• Country Profile			
• DSO Profiles			
- Eskom			
6.6.9 Tanzania	549		
• Country Profile			
• DSO Profiles			
- Tanzania Electric Supply Company (TANESCO)			
6.6.10 Tunisia	553		
• Country Profile			
• DSO Profiles			
- Société Tunisienne de l'Electricité et du Gaz (STEG)			
6.6.11 Uganda	557		
• Country Profile			
• DSO Profiles			
- Umeme Limited			
<i>Each DSO profile has information and data on:</i>			
•	Size and growth in the distribution network (2014-19)		
•	Growth in electricity sales and customer base (2014-19)		
•	Trends in operational performance (2014-19)		
	- Distribution losses		
	- SAIFI/SAIDI indices		
•	Trends in financial performance (2014-19)		
	- Revenue from electricity distribution		
	- Net profit/net income		
	- Capex/Investment in the distribution network		
•	Forecast and projections		
	- Network plans and targets		
	- Expected capex/investment trends		
	- Major focus areas		
<i>Each country profile has information and data on</i>			
•	Past growth in generation and consumption		
•	Institutional and regulatory structure, and key players		
•	Expected growth in consumption		
<b>PART 7</b>			
<b>APPENDIX</b>			
7.1	Sources and methodology		561
7.2	List of abbreviations		563

## 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 2014 to 2019 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.

Financial ratios (return on equity and debt to equity) have been estimated based on commonly acceptable formulas, where ever these ratios were not available from the financial reports of the DSOs.

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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