

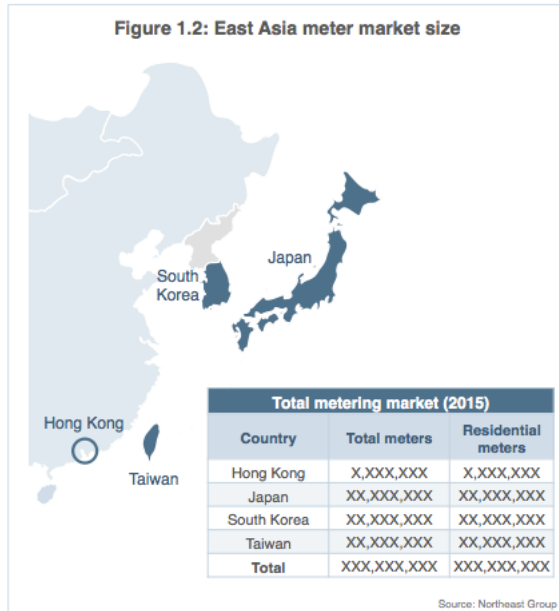


**northeast group, llc**

## East Asia Smart Grid: Market Forecast (2015 – 2025)

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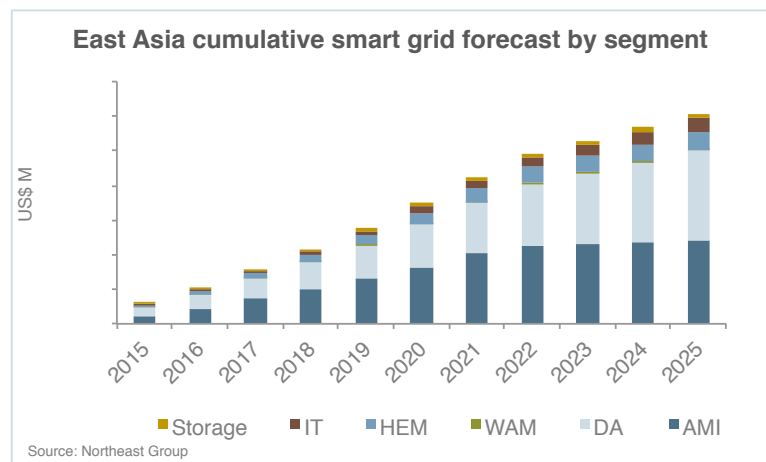


East Asia is the last of the developed regions (behind North America, Western Europe, and, to a lesser extent, Oceania) to begin large-scale smart grid deployments. Led by Japan – the largest market in the region – large-scale rollouts are now underway, and the region will be one of the largest in the world over the next five years in terms of annual value. Utilities in Japan, South Korea, and Taiwan have all set timetables for smart grid deployments, and there is little risk that these will not be implemented. Additionally, given the high level of per-capita electricity consumption across the region, East Asian governments will look to invest in a wide variety of energy-saving smart city

infrastructure, including smart street lighting, smart transportation systems, home energy management and distributed generation. These will bring added value to the market as AMI deployments are completed in the leading markets of Japan and Korea in the early 2020s. These investments will combine to create one of the largest smart grid markets in the world. Even though many local firms are active – and may have an advantage in winning tenders – there are ample near-term and long-term opportunities for international smart grid vendors in the East Asia region.

Key questions answered in this study:

- Where are the timelines of smart grid deployments in East Asia?
- Which Japanese utilities will deploy smart meters first?
- How large is the overall smart grid opportunity in East Asia?
- Which local vendors are active and who are the leading international vendors?



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