

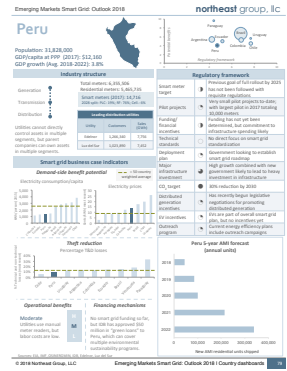
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# Emerging Markets Smart Grid: Outlook 2018

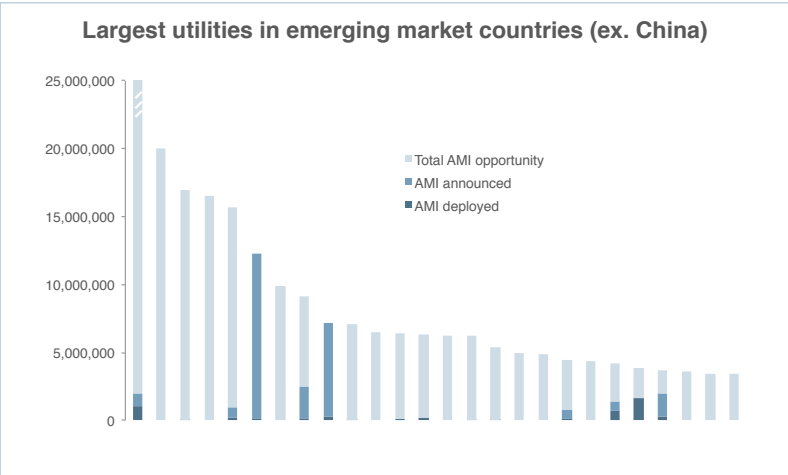
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# Emerging Markets Smart Grid: Outlook 2018

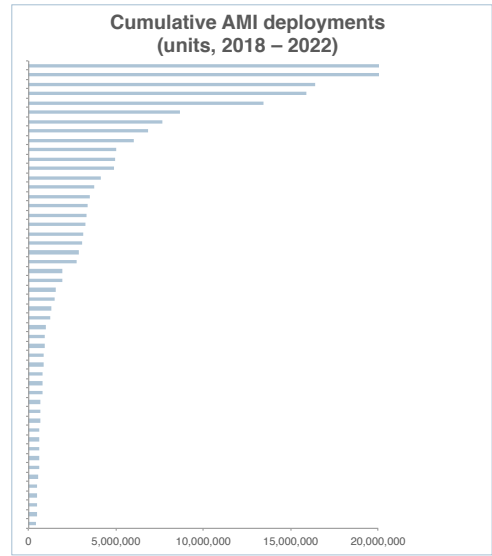
Northeast Group’s *Emerging Markets Smart Grid: Outlook 2018* is the seventh edition of its annual look at smart grid infrastructure opportunities in the developing world. Since the first edition, smart grid plans, regulations, and deployments have progressed from nascent pilots to large-scale rollouts. For this reason, for the first year, this study focuses on investment over a five-year period rather than a ten-year period. Over the next decade, almost all emerging market countries will see significant smart grid investment. But now there are extensive near-term opportunities to take note of and quantify over the next five years. This study highlights the 50 emerging market countries that will see the most smart grid investment in the near term.



The focus on emerging markets is increasingly relevant for parallel reasons. After some delays, most major deployments are already awarded and being deployed in developed countries in North America, Western Europe, and East Asia. These markets represent over 75% of the current installed base of smart meters. As these projects wrap up, vendors will need to focus on new opportunities. These opportunities are now opening up across emerging market countries, with notable tenders and plans for full rollouts across all emerging market regions. In short, smart grid infrastructure in emerging markets will quickly transition from a potential future opportunity to concrete near-term awards.



Smart grid projects in emerging markets are not without risk. Several previously forecast rollouts have failed to materialize, and even recent tenders have been rescinded. But market conditions have improved increasingly every year – at the start of 2018 there are more tenders and more smart meter regulatory targets than in any previous year. Meanwhile, non-technical loss rates remain high, GDP and electricity consumption rates continue to grow, and for the first time, per-endpoint AMI prices have begun to steadily decline. As a result, the conditions are now in place for these 50 countries to invest over \$67 billion in smart grid infrastructure over the next five years.



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Key questions answered in this study:

- Which 50 emerging market countries will deploy the most AMI meters over the next five years?
- Which tenders are expected for 2018 and which tenders are stalling?
- Which countries were most active in developing smart grid-related policies and which countries took a step back?
- What is the forecast market for AMI, distribution automation, wide area measurement, home energy management, IT and battery storage in each emerging market region?
- How do emerging markets compare with developed countries in forecast deployments?

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In addition to the figures and tables shown above, each country summary includes the following:

Table: Industry structure;

Table: Regulatory framework;

Chart: Regional smart meter potential;

Chart: Regional electricity consumption per capita (kWh);

Chart: Regional electricity prices (cents per kWh);

Chart: Regional T&D losses (%).

Therefore, this study includes over 100 additional unique charts and tables in addition to those cited above.

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