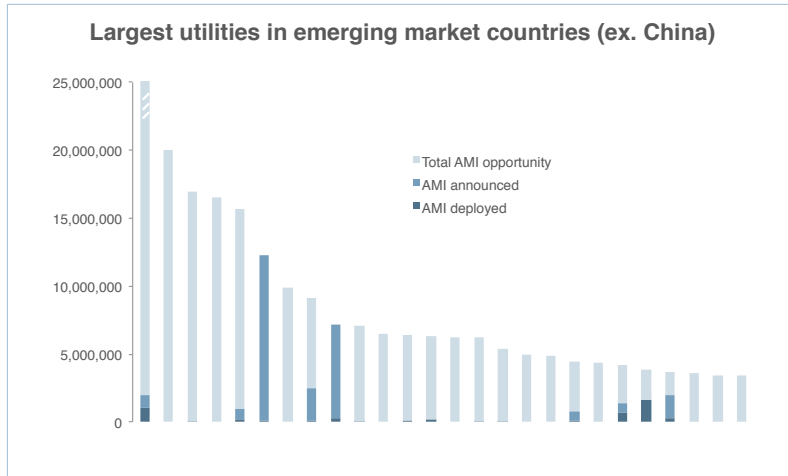


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Emerging Markets Smart Grid: Outlook 2019

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Emerging Markets Smart Grid: Outlook 2019

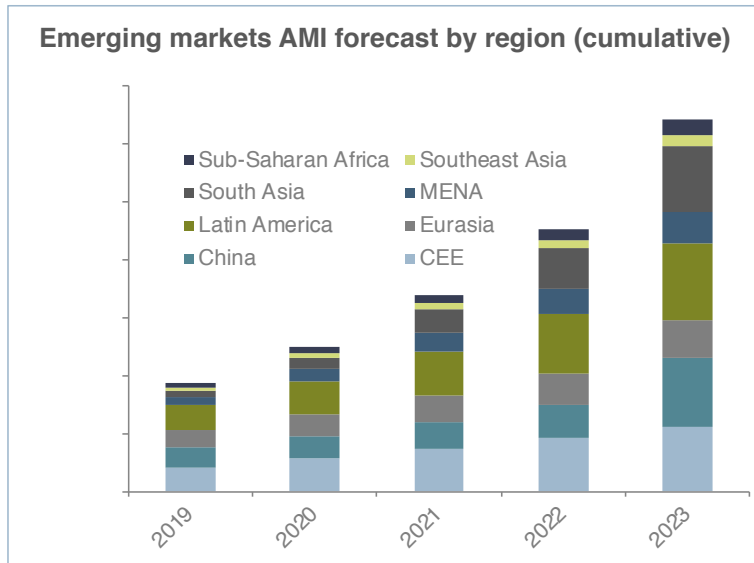


Emerging Markets Smart Grid: Outlook 2019 is the eighth edition of Northeast Group’s annual study looking at smart grid opportunities in developing countries. Since the first edition, smart grid plans, regulations, and deployments have progressed from nascent pilots to large-scale rollouts. Over the next decade, almost all emerging market countries will see significant smart grid infrastructure investment. But right now, there are extensive near-

term opportunities to take note of and quantify over the upcoming five-year period. This study highlights the 50 emerging market countries that will see the most investment in the near term.

The focus on emerging markets is increasingly relevant. After some delays, most major deployments are already awarded and in many cases already underway in developed countries in North America, Western Europe, and East Asia. These markets represent more than three-quarters of the current installed base of smart meters. As these projects wrap up, vendors will shift their focus to opportunities opening up in countries across emerging market regions. Smart grid infrastructure in emerging markets is quickly transitioning from a potential future opportunity to concrete near-term awards.

Smart grid infrastructure projects in emerging markets are not without risk. Several previously forecast rollouts have failed to materialize, and recent tenders have been rescinded. But market conditions have increasingly improved every year – at the start of 2019 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 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 \$60 billion in smart grid infrastructure over the next five years.



Key questions answered in this study:

- Which 50 emerging market countries will deploy the most AMI meters over the next five years?
- Which countries have hit project obstacles and which have reached key milestones?
- Which were the most active countries in developing smart grid-related policies and which ones took a step back?
- What is the forecast market for AMI, distribution automation, wide area measurement, home energy management, and IT in each emerging market region over the next five years?

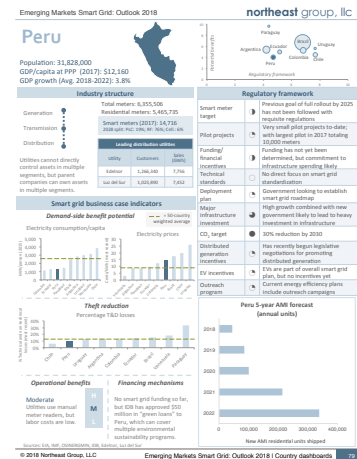


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In addition to the figures and tables shown above, each country summary includes the following:

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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