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Middle East & North Africa Smart Grid: Market Forecast (2018 – 2027)

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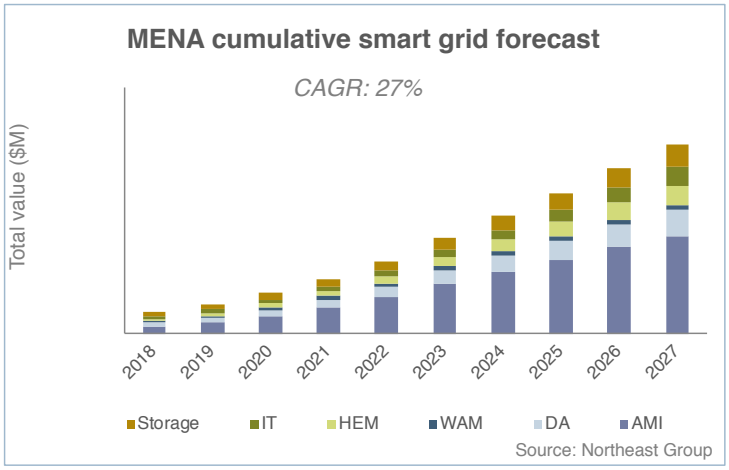
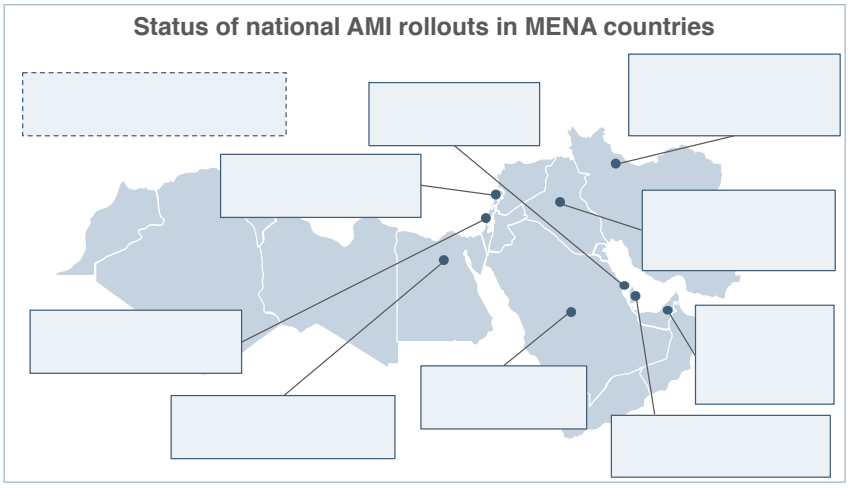


Smart grid infrastructure development is accelerating in the Middle East & North Africa (MENA) region, showing strong potential in the near-to-medium term. In the Gulf states, high incomes, high electricity consumption, and small populations are driving smart meter deployments. Elsewhere in the region, the prevalence of high non-technical losses and poor energy efficiency are creating positive smart grid business cases. Also, extensive solar power development and grid interconnections across the MENA region are requiring rapid grid modernization.

Smart grid investment in the MENA region will largely be a state-driven process, owing to government control of nearly all power sector activity. This creates both opportunities and challenges. Gulf governments have ample cash on hand and exhibit a strong desire to modernize their countries and their economies. Smart grid deployments offer these countries an excellent opportunity to modernize their infrastructure, lay the foundation for additional energy-saving applications, and ultimately diversify their economies away from dependence on oil and gas.

But governments and investors in the Gulf are also wary of the upheavals seen throughout the MENA region. Support for current governments is built in part on populist policies such as free or nearly free electricity. Some of the benefits of smart meters can only be realized with market or near-market prices for electricity, which in some cases governments may be unwilling to implement. Several countries have recently implemented subsidy reform policies, but these are in their early stages and it remains to be seen if cost-recovery can be achieved through properly set tariff levels.



Political risk remains a challenge–and has delayed some projects–but remains low in the high-spending Gulf countries. More utilities are announcing large-scale plans, grid interconnections have continued, some electricity price subsidies have been reduced, and solar power plans have grown more ambitious. All of these trends show that MENA governments understand that smart grid infrastructure investment is critical to future growth plans. In particular, MENA countries continue to move forward with "smart city" concepts and are looking to highlight the modernization of their economies. As these projects proliferate, the MENA smart grid market will see steady growth in the near-to-medium term, setting the stage for a very significant market between 2018 and 2027.

Key questions answered in this study:

- How large will the smart grid market be across the MENA region?
- Which national rollouts in the region are proceeding on time and which are delayed?
- How will development of solar power impact smart grid investment in the region?
- What major international and local vendors are best positioned to supply the MENA market?

Research Deliverables: *230-page PDF study, executive summary slides and Excel dataset.*

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