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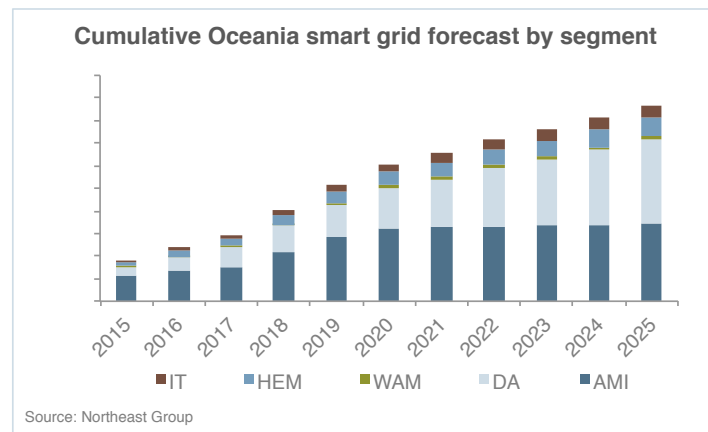
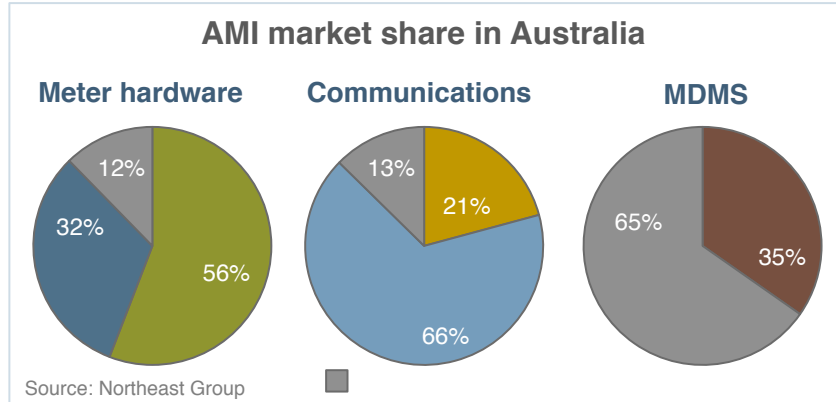
Oceania Smart Grid:
Market Forecast (2015 – 2025)

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Oceania Smart Grid: Market Forecast (2015 – 2025)

Oceania has one of the most developed power sectors in the world, with well performing utilities, unsubsidized electricity prices, and high rates of electricity consumption. Australia and New Zealand are both well positioned to continue

their existing smart grid projects and develop new ones. The sector will be underpinned by the countries' high per-capita income and a number of incentives for clean technology. Indeed, New Zealand has nearly completed its AMI rollout, as has the Australian state of Victoria (representing 25% of the national market). Victoria's rollout was driven by a state government mandate. So far, regulations in other Australian states and at the national level have been more limited. But customers and utilities in Victoria are already seeing clear benefits from AMI deployments, which could encourage other states to begin incentivizing deployments. Additionally, New Zealand has accomplished its rollout without significant regulations, simply



due to the positive business case of AMI. As a result, the rest of Australia is expected to begin AMI deployments in the next 1-3 years, followed by further investment in distribution automation, home energy management, and other smart grid segments. Cumulatively, Australia and New Zealand will invest \$6.8 billion in smart grid infrastructure over the next ten years.

Key questions answered in this study:

- What are the near-term smart grid opportunities in Oceania?
- Who are the leading vendors in existing projects?
- Which states are considering regulations to drive smart grid deployments?
- What benefits have customers already achieved from smart grid?

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