



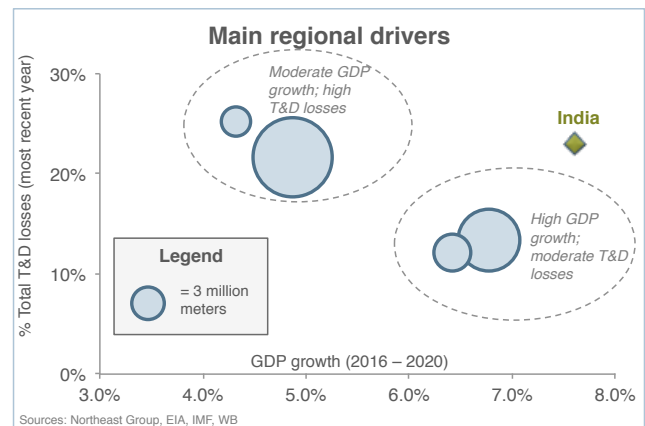
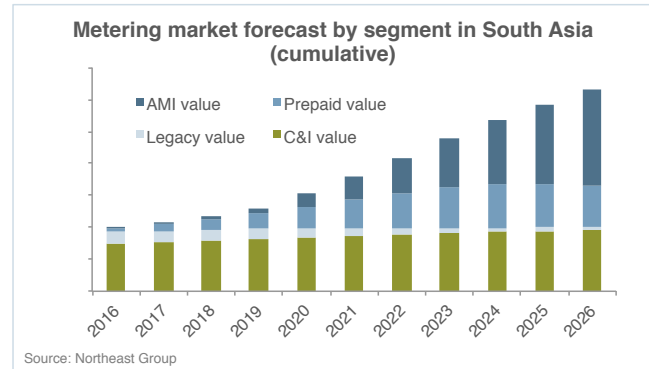
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South Asia Smart Grid:
Market Forecast (2016 – 2026)
(excluding India)

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South Asia Smart Grid: Market Forecast (2016-2026)

The South Asian region is poised for a decade of strong, continuous economic growth. However, South Asian countries' power sectors face a diversity of challenges that could limit overall economic growth potential. These countries' utilities must invest in new sources of generation as well as transmission and distribution (T&D) infrastructure to ensure reliability, but many utilities are financially unsustainable. Smart grid and advanced metering (both prepaid and AMI) infrastructure will be critical for utilities to ensure revenue protection in the region with the highest T&D losses in the world, while simultaneously allowing utilities to address generation and reliability issues. Advanced metering plans are now already in place and by 2026, 79% of all meters in South Asia (excluding India) will be either AMI or non-communicating prepaid meters.



At the same time, smart grid in South Asia faces many challenges, and actual deployments to-date have been limited. Most notably, per-capita electricity consumption (excluding India) is the lowest in the world. In per-capita consumption terms, the cost of advanced meters may be prohibitively high in some areas. Additionally, political and security risk concerns may limit large-scale investments. Multilateral funding is helping to address these concerns, providing financing and improving confidence that projects will be carried out. Once projects begin, South Asia's current low installed base of advanced meters means that there will be rapid growth opportunities throughout the next decade.

Key questions answered in this study:

- How large will the electricity metering and smart grid markets in South Asia be over the next ten years?
- Which countries and utilities have large-scale prepaid metering plans and electrification goals?
- Who is receiving funding for smart grid from multilateral lending agencies and how will this affect the market?
- Where are the largest opportunities for commercial and industrial meters?
- Who are the leading vendors and which ones are well placed to compete for this growing market?

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