

Saudi Arabia Electric Smart Meters Market Segmented By Type (Automatic Metering Infrastructure (AMI) and Automatic Meter Reading (AMR)), By Phase (Single Phase and Three Phase), By Technology (Power Line Communication, Radio Frequency and Cellular), By End User (Residential, Commercial and Industrial), By Region, and By Competition, 2018-2028

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Abstracts

Saudi Arabia Electric Smart Meters Market has valued at USD 641.17 million in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 4.49% through 2028. Vision 2030 is a comprehensive development plan for Saudi Arabia aimed at reducing the country's dependence on oil and diversifying the economy. As part of this vision, the government is actively focusing on modernizing the energy sector, improving efficiency, and promoting sustainability. Electric smart meters are a crucial element in achieving these objectives as they facilitate better energy management, reduce waste, and enhance the grid's reliability.

Key Market Drivers

Government Initiatives and Regulations

The Saudi Arabia Electric Smart Meters Market is experiencing significant growth due to various drivers, one of the most prominent being government initiatives and regulations. The Saudi Arabian government has recognized the importance of modernizing its energy infrastructure, improving efficiency, and promoting sustainability in the energy sector. As a result, several key initiatives and regulations have been put in place, creating a conducive environment for the adoption of electric smart meters.

The introduction of the 'National Transformation Program 2020' and the 'Vision 2030' initiative by the Saudi government set the stage for comprehensive energy sector reforms. Part of these reforms includes the rollout of electric smart meters, which are central to achieving objectives such as energy efficiency, reducing electricity theft, and optimizing energy consumption. Regulatory bodies, such as the Electricity and Cogeneration Regulatory Authority (ECRA), have played a pivotal role in defining the technical specifications, standards, and timelines for the implementation of electric smart meters.

Another vital component of these government initiatives is financial incentives and subsidies. The government has offered financial support to utility companies and consumers to facilitate the mass deployment of electric smart meters. These incentives include subsidies for meter installation and favorable financing options, encouraging both utilities and consumers to adopt smart metering technology.

Furthermore, regulations have been put in place to ensure fair and transparent billing, as well as to address concerns related to data privacy and security. Electric smart meters enable real-time data collection and reporting, leading to accurate billing, which helps in reducing disputes and improving customer satisfaction. These regulations assure consumers that their data is handled securely, fostering trust and increasing acceptance of smart meters.

Overall, government initiatives and regulations are pivotal drivers for the growth of the Saudi Arabia Electric Smart Meters Market. They create a supportive environment for the adoption of smart meters, offer financial incentives, and ensure that necessary standards and safeguards are in place, ultimately benefiting both utilities and consumers.

Increasing Energy Efficiency and Sustainability Goals

The Saudi Arabia Electric Smart Meters Market is being driven by the growing emphasis on increasing energy efficiency and achieving sustainability goals. As part of its commitment to reduce energy waste, greenhouse gas emissions, and reliance on non-renewable resources, the country is turning to electric smart meters as a solution to optimize energy consumption and promote sustainable practices.

Electric smart meters enable real-time monitoring and reporting of energy usage. This information empowers consumers to make more informed decisions about their energy

consumption. By understanding their energy patterns, consumers can take steps to reduce waste and lower their energy bills. For businesses and industries, this data is invaluable for identifying areas of inefficiency and implementing energy-saving measures. The result is reduced energy consumption, lower utility bills, and a decreased carbon footprint.

The Kingdom of Saudi Arabia has set ambitious sustainability goals in alignment with the Paris Agreement and other international accords. Electric smart meters play a crucial role in achieving these targets. By improving energy efficiency and reducing waste, the country can meet its commitments to reduce carbon emissions and promote a greener, more sustainable energy ecosystem.

Moreover, electric smart meters enable demand-response programs. These programs allow utilities to incentivize consumers to shift their energy usage to off-peak hours, reducing strain on the grid during high-demand periods. This not only improves the reliability of the energy supply but also reduces the need for additional power generation capacity, often from fossil fuels.

Electric smart meters also support the integration of renewable energy sources into the grid. As Saudi Arabia invests in renewable energy projects, smart meters provide the tools needed to manage and balance the intermittent nature of renewable energy resources. This is essential for maintaining a stable and resilient grid while incorporating a larger share of clean energy.

In summary, the emphasis on increasing energy efficiency and achieving sustainability goals is a significant driver for the Saudi Arabia Electric Smart Meters Market. By facilitating informed energy consumption, reducing waste, and promoting the integration of renewable energy, smart meters are instrumental in advancing the country's sustainability objectives.

Technological Advancements and Digitalization

Technological advancements and the broader trend of digitalization are key drivers for the Saudi Arabia Electric Smart Meters Market. The energy sector, like many others, is undergoing a digital transformation, and electric smart meters are at the forefront of this revolution.

Electric smart meters are equipped with advanced technologies, such as two-way communication capabilities, real-time data collection, and remote monitoring. These

features allow utilities to have better control over their networks, quickly respond to outages, and remotely perform tasks like disconnecting or reconnecting service. This digitalization of metering and data management significantly enhances the overall efficiency of the energy distribution system.

Furthermore, these smart meters enable consumers to access their energy usage data via online portals or mobile apps. This level of connectivity and data accessibility empowers consumers to manage their energy consumption, set preferences, and receive alerts, providing a more interactive and convenient experience. This digitalization not only enhances user engagement but also contributes to customer satisfaction.

The data generated by electric smart meters is invaluable for utilities and consumers alike. It helps utilities identify and address power quality issues, manage load distribution, and plan for network upgrades more effectively. For consumers, this data can lead to more accurate billing, improved energy consumption decisions, and enhanced awareness of their carbon footprint.

The growth of the Internet of Things (IoT) and smart home technologies also aligns with the rise of electric smart meters. These meters can seamlessly integrate with other IoT devices and smart appliances, creating a comprehensive smart home ecosystem. This integration enhances energy efficiency by allowing devices to communicate and optimize energy consumption automatically.

In conclusion, technological advancements and digitalization are driving the Saudi Arabia Electric Smart Meters Market by making energy management more efficient, interactive, and user-friendly. These smart meters serve as a foundation for the broader digitalization of the energy sector and are essential in facilitating the integration of smart technologies into homes and businesses.

Key Market Challenges

Infrastructure Readiness and Integration

One of the significant challenges facing the Saudi Arabia Electric Smart Meters Market is the readiness of existing infrastructure and the seamless integration of electric smart meters into the country's energy grid. The installation of smart meters involves substantial changes in the way utilities collect and manage data. However, many parts of the existing energy infrastructure in Saudi Arabia were not originally designed to

accommodate such advanced technology.

The integration challenge begins with ensuring that the communication networks necessary for smart meters are robust and reliable. Smart meters rely on two-way communication systems to transmit data in real-time. The existing communication infrastructure might need extensive upgrades to handle the increased data flow and ensure the security of information. In remote or less-developed areas, establishing the necessary communication infrastructure can be especially challenging.

Additionally, utilities need to adapt their data management systems to handle the vast amounts of data generated by electric smart meters. This requires investments in data storage, processing, and analytics capabilities. Ensuring the security and privacy of the data collected is also a critical concern, given the potential sensitivity of energy consumption data.

Moreover, Saudi Arabia's power grid needs to be upgraded to accommodate the bi-directional flow of electricity. Electric smart meters enable demand-response programs, distributed energy resources, and potentially even electric vehicle charging. All of these require a more flexible and adaptive grid, which could necessitate substantial investments in grid infrastructure.

Overall, the challenge of integrating electric smart meters into the existing energy infrastructure is multifaceted, requiring significant investments and careful planning to ensure a smooth transition.

Consumer Education and Engagement

Another substantial challenge facing the Saudi Arabia Electric Smart Meters Market is the need for consumer education and engagement. Electric smart meters offer numerous benefits, such as real-time consumption data, energy-saving opportunities, and more accurate billing. However, these advantages are only fully realized when consumers are actively engaged and educated about how to use the technology to their benefit.

Consumer education is essential because many Saudi Arabian households may not be familiar with the benefits of smart meters or may be skeptical about sharing their energy consumption data. Consumers need to understand how these meters work, how they can access and interpret their data, and what steps they can take to reduce energy consumption and costs. Utility companies and government agencies need to proactively

educate consumers about the advantages of smart meters and address concerns related to privacy and data security.

Effective engagement strategies are also crucial. It's not enough to simply install smart meters; utilities and other stakeholders must actively involve consumers in their energy management. This could involve offering incentives for reducing peak-time energy consumption or implementing user-friendly apps and interfaces that make it easy for consumers to access and interpret their energy data.

Overcoming this challenge requires a comprehensive and sustained effort to ensure that consumers are not only aware of the benefits of electric smart meters but also actively participate in optimizing their energy consumption and contributing to overall grid efficiency.

Cost and Funding

The cost of deploying electric smart meters is a significant challenge for the Saudi Arabia Electric Smart Meters Market. Implementing a nationwide smart metering infrastructure involves substantial upfront capital investment, covering the cost of the meters, communication infrastructure, data management systems, and installation. This cost can be a considerable burden for utilities and the government.

While the long-term benefits of electric smart meters, such as reduced operational costs and increased energy efficiency, are clear, securing the initial funding is a hurdle. The financial burden is especially challenging for smaller utility companies or those serving remote areas with limited resources.

Funding for smart meter deployment can come from various sources, including government grants and incentives, private investments, or consumer contributions. The Saudi government has been proactive in providing financial support and incentives, but it may still fall short of covering the entire deployment cost.

Another challenge related to funding is the long payback period. It can take several years for utilities to recoup their investment through operational savings and increased efficiency. This extended period of financial uncertainty can make it difficult to secure funding, especially from private investors seeking quicker returns on their investments.

To address this challenge, a combination of funding sources, innovative financing models, and clear cost-benefit analysis is required to ensure the successful

implementation of electric smart meters in Saudi Arabia. Collaboration between government, utilities, and private sector stakeholders is crucial to create sustainable financial models that support the growth of smart metering infrastructure while ensuring the affordability of electricity for consumers.

Key Market Trends

Accelerated Deployment of Advanced Metering Infrastructure (AMI)

In the Saudi Arabia Electric Smart Meters Market, one prominent trend is the accelerated deployment of Advanced Metering Infrastructure (AMI). AMI encompasses not only smart meters but also the communication networks and data management systems that support them. Saudi Arabia has recognized the potential benefits of AMI, including improved energy efficiency, enhanced grid management, and reduced electricity theft, leading to a faster adoption rate.

With the ambitious 'Vision 2030' initiative in full swing, Saudi Arabia is actively working towards modernizing its energy infrastructure. As part of this vision, the country is investing in the expansion of AMI networks. Utilities and government agencies are collaborating to install smart meters at a rapid pace, aiming to cover a significant portion of the country's residential and commercial electricity customers. This trend aligns with Saudi Arabia's broader commitment to reducing energy waste and achieving sustainability goals.

The adoption of AMI not only enhances operational efficiency for utilities but also empowers consumers to monitor and manage their energy consumption more effectively. As AMI deployment accelerates, the Saudi Electric Smart Meters Market is poised to witness substantial growth in the coming years.

Data Analytics and Artificial Intelligence Integration

Another notable trend in the Saudi Arabia Electric Smart Meters Market is the increasing integration of data analytics and artificial intelligence (AI). Electric smart meters generate vast amounts of data, providing a wealth of information about energy consumption patterns and grid performance. To leverage this data effectively, utilities are turning to advanced analytics and AI solutions.

AI-driven analytics enable utilities to gain insights from the data collected by smart meters. Predictive maintenance algorithms can help identify potential equipment

failures, reducing downtime and maintenance costs. Demand forecasting models allow utilities to optimize energy generation and distribution, leading to more efficient grid operations. Customer segmentation and personalization can improve engagement and enable tailored energy-saving recommendations.

This trend is not only about optimizing utility operations but also enhancing the customer experience. Consumers can access personalized insights into their energy consumption and receive recommendations on how to reduce their bills and environmental impact. As AI and data analytics continue to evolve, they will play a crucial role in shaping the future of the Saudi Electric Smart Meters Market.

Segmental Insights

Phase Insights

The Single Phase segment emerged as the dominating segment in 2022. Single-phase meters are primarily used for residential and small commercial applications, making them a critical component of the smart metering landscape. The Single Phase segment in the Saudi Arabia Electric Smart Meters Market is experiencing substantial growth. It caters to residential customers, which constitute a significant portion of the electricity consumption base. The growing population, urbanization, and the rise of small businesses are contributing to the increasing demand for single-phase smart meters. The market size in this segment has been expanding steadily due to government initiatives and modernization efforts.

Single-phase meters are primarily designed for residential customers and small businesses. In Saudi Arabia, where a significant part of the population resides in urban areas, these meters play a crucial role in ensuring accurate billing and promoting energy efficiency. The growing need for electricity in households and small commercial establishments has resulted in a substantial market for single-phase smart meters.

Single-phase smart meters are instrumental in enhancing consumer engagement and promoting energy efficiency in residential settings. They provide real-time data on energy consumption, enabling homeowners to monitor their usage, identify energy-saving opportunities, and ultimately reduce their electricity bills. This aligns with the government's sustainability goals and the desire to empower consumers to make more informed energy consumption decisions.

The deployment of single-phase smart meters is an essential component of integrating

renewable energy sources, such as rooftop solar panels, into the grid. As Saudi Arabia invests in renewable energy projects, these meters allow consumers to feed excess energy back into the grid, promoting clean energy adoption at the residential level.

End User Insights

The Residential segment is projected to experience rapid growth during the forecast period. Residential smart meters are benefiting from ongoing technological advancements. These meters are becoming more sophisticated, featuring IoT integration, two-way communication, and real-time monitoring capabilities. These technological advancements improve user experience and enhance grid management.

The Saudi Electric Smart Meters Market places a strong emphasis on data privacy and security in the Residential segment. Protecting the privacy of consumer data and ensuring the secure operation of these meters is a priority, given the sensitivity of residential information.

The Saudi government actively supports the deployment of residential smart meters. Financial incentives, subsidies, and favorable financing options are available to encourage homeowners to adopt smart metering technology. These incentives promote the growth of the Residential segment.

The Residential segment is highly competitive, with various technology providers and utilities striving to capture market share. This competition encourages innovation and the development of advanced residential smart meter solutions.

In conclusion, the Residential segment of the Saudi Arabia Electric Smart Meters Market is a vital component of the country's energy landscape. It offers consumers the opportunity to become more actively engaged in managing their energy consumption, promotes energy efficiency, and supports the integration of renewable energy sources. As technology continues to advance and government support remains strong, the Residential segment is poised for further expansion and development.

Regional Insights

Riyadh emerged as the dominant region in the Saudi Arabia Electric Smart Meters market in 2022, holding the largest market share. The Saudi government's focus on sustainability and energy efficiency offers a substantial opportunity for the Electric Smart Meters Market. Smart meters enable consumers to monitor and manage their energy

consumption more effectively, resulting in reduced energy waste, lower electricity bills, and a decreased carbon footprint. Achieving sustainability goals and reducing greenhouse gas emissions are key priorities, and electric smart meters play a critical role in reaching these targets.

The deployment of smart meters enables utilities to implement demand-response programs. These programs encourage consumers to shift their energy usage to off-peak hours, reducing the strain on the grid during high-demand periods. This not only improves grid reliability but also reduces the need for additional power generation capacity, often from fossil fuels. As technology continues to evolve, there are opportunities for innovation and enhancements in the Electric Smart Meters Market. Advanced meters can integrate with other IoT devices, creating a comprehensive smart home ecosystem. This integration can provide consumers with even greater control over their energy usage and further improve efficiency.

Electric smart meters enable utilities to generate more accurate bills based on actual consumption. This accuracy reduces billing disputes and increases customer satisfaction. Moreover, the transparency of real-time data empowers consumers to make informed decisions about their energy consumption, further enhancing their overall experience. The deployment of electric smart meters creates opportunities for job creation and economic growth. It involves manufacturing, installation, maintenance, and data management, leading to employment opportunities in various sectors.

The Saudi government has been proactive in providing financial support, subsidies, and incentives for the adoption of electric smart meters. These incentives help utilities offset the initial deployment costs, making it more economically feasible to invest in smart metering infrastructure. The data generated by smart meters can offer valuable insights to utilities and other stakeholders. These insights can be leveraged for better decision-making, including load forecasting, grid optimization, and maintenance planning.

The growing interest in electric smart meters has attracted market competition and innovation. This competition can lead to the development of more advanced metering solutions, which can benefit both utilities and consumers.

In conclusion, the Saudi Arabia Electric Smart Meters Market offers numerous opportunities that align with the country's goals of sustainability, grid modernization, and energy efficiency. As technology continues to evolve and the government's commitment to these objectives remains steadfast, the market is poised for continued growth and development.

Key Market Players

Landis+Gyr

Elster

Iskraemeco

Itron

Schneider Electric

Siemens

Aclara

Holley Technology

Kamstrup

Honeywell

Report Scope:

In this report, the Saudi Arabia Electric Smart Meters Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Saudi Arabia Electric Smart Meters Market, By Type:

Automatic Metering Infrastructure (AMI)

Automatic Meter Reading (AMR)

Saudi Arabia Electric Smart Meters Market, By Type:

Single Phase

Three Phase

Saudi Arabia Electric Smart Meters Market, By Technology:

Power Line Communication

Radio Frequency

Cellular

Saudi Arabia Electric Smart Meters Market, By End User:

Residential

Commercial

Industrial

Saudi Arabia Electric Smart Meters Market, By Region:

Riyadh

Makkah

Eastern Province

Rest of Saudi Arabia

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Saudi Arabia Electric Smart Meters Market.

Available Customizations:

Saudi Arabia Electric Smart Meters Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Saudi Arabia Electric Smart Meters Market Segmented By Type (Automatic Metering Infrastructure (AMI) and Autom...

Company Information

Detailed analysis and profiling of additional market players (up to five).

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