

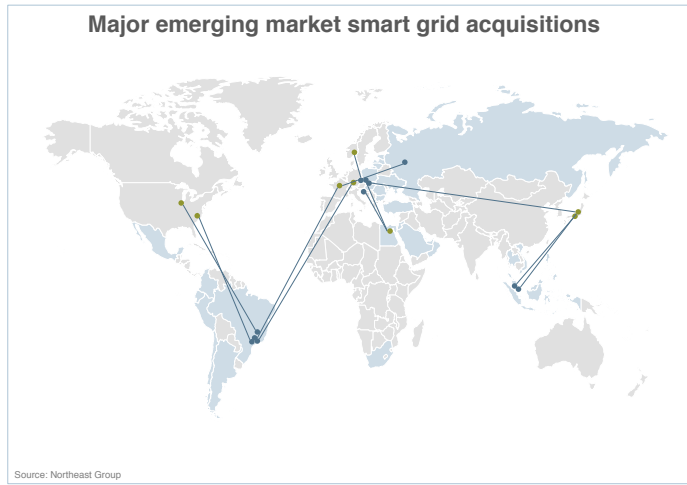
northeast group, llc

Global Smart Grid Vendor Landscape
Internet of Things (IoT) in the Power Sector

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Global Smart Grid Vendor Landscape

The smart grid vendor landscape is undergoing a period of change. In developed countries in North America, Europe, and East Asia, markets are maturing and vendors are consolidating. Several of the larger vendors now offer integrated solutions throughout the smart metering value chain, while communications and data analytics providers are increasingly active across multiple smart grid segments, improving the coordination between smart metering, distribution automation and home energy management. Meanwhile, in emerging market countries – across Africa, Central & Eastern Europe, Eurasia, Latin America, the Middle East & North Africa, South Asia, and Southeast Asia – the market is just beginning to grow. Dozens of local vendors have begun to serve smart grid projects, both on their own and as partners of larger international firms. With high growth rates projected for smart grid projects in emerging market countries, this represents the next frontier of vendor activity and opportunity. The dynamics between growing and consolidating international smart grid vendors and smaller, more fragmented local players will help shape the speed and direction of smart grid deployments across the globe.



This study takes a comprehensive look at the trends shaping the smart grid vendor landscape and how firms are positioning themselves to succeed. It includes over 500 vendors already

Regions where leading AMI vendors are active in smart grid projects										
Vendor	Africa	East Asia	Eurasia	Europe	Latin America	MENA	North America	Oceania	South Asia	Southeast Asia
	█		█	█						█
	█									█
			█	█	█		█	█		
			█	█	█		█			
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active in smart grid projects across all regions of the world, highlights growing regions and market segments, and assesses the existing partnerships, mergers, and acquisitions that are altering the smart grid market. Across 125 countries, smart grid investment will reach \$380.1 billion between 2015 and 2025. This study presents a picture of the competitive landscape of the hundreds of vendors competing for this growing market.

Key questions answered in this study:

- Which trends are impacting the leading smart grid vendors?
- Which recent partnerships, mergers, and acquisitions have altered the smart grid market?
- Who are the leading vendors in each region?
- Which emerging market based vendors are best positioned to partner with leading international vendors?
- What is the global market size for 14 smart grid sub-segments?

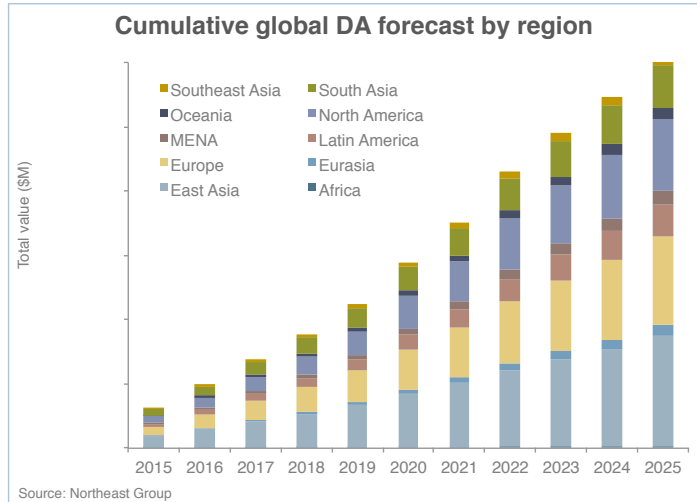


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