The smart infrastructure vendor landscape is undergoing a period of dramatic change. A market that for years was dominated by vendors providing metering, smart grid infrastructure and communications to the utility sector is now increasingly focused on broader smart cities opportunities, analytics, and recurring revenue models. This has created both opportunities and challenges for the leading smart grid vendors that are simultaneously facing competition and partnership opportunities from smart city-focused vendors, telecom operators, software and analytics companies, low-cost Chinese hardware vendors, and other new entrants. Overall, while mergers and acquisitions have helped consolidate the smart grid market, the number of vendors active in the larger overall smart infrastructure and IoT markets only continues to grow as new market segments develop and smart infrastructure spreads to all geographies.

This study takes a comprehensive look at the trends shaping the smart infrastructure vendor landscape and how companies are positioning themselves to succeed and grow. The study provides a snapshot of the current market in terms of AMI and smart street lighting market shares for 2017, but also crucially looks forward to the key trends that will drive these markets forward in the coming decade. This includes vendor descriptions, including active projects, main product offerings, and partnerships for over 200 vendors active in smart infrastructure projects across all regions of the world. These vendors will compete for investment that will total over $530 billion in smart grid, smart water, and smart street lighting across 125 countries between 2018 and 2027.

Key questions answered in this study:

- What are the market shares for leading vendors of smart metering (AMI) and smart street lighting across all regions of the world?
- What key trends are shaping the smart infrastructure vendor landscape?
- How are smaller regional players affecting smart infrastructure segments?
- What are the most significant smart infrastructure mergers and acquisitions in the past year?

Research Deliverables: 179-page PDF study and executive summary presentation.
Table of Contents

i. Executive Summary 1

1. Vendor growth trends 2

2. AMI and smart street lighting market share 18

3. Segment overviews 34

4. Appendix 47

   4.1 Smart infrastructure vendor descriptions 47

      4.1.1 Smart metering vendors 47

      4.1.2 Distribution automation vendors 85

      4.1.3 Other smart grid segment vendors 94

      4.1.4 Smart water vendors 126

      4.1.5 Smart street lighting vendors 134

   4.2 Methodology 161

   4.3 List of abbreviations and companies covered 163

List of Figures, Boxes, and Tables

Figure 1.1: First Half 2018 Smart Infrastructure M&A Activity 2

Table 1.1: Recent smart infrastructure M&A deals 4

Figure 1.2: Various models of managed services 6

Figure 1.3: SMaaS vendor landscape 7

Figure 1.4: Revenue protection analytics vendor landscape 10

Figure 1.5: Smart city infrastructure potential by segment 12

Figure 1.6: Smart streetlight communications vendors by type 13

Figure 1.7: Smart meter vendor growth opportunities matrix 15

Table 1.2: Smart meter vendor growth opportunities scoring criteria 15

Table 1.3: How the leading smart metering vendors compare on key trends 16

Figure 2.1: Global (ex. China) AMI meter hardware market share 19

Figure 2.2: North America AMI meter hardware market share 20

Figure 2.3: Latin America AMI meter hardware market share 21

Figure 2.4: Europe AMI meter hardware market share 22

Figure 2.5: Eurasia AMI meter hardware market share 23

Figure 2.6: Middle East & Africa AMI meter hardware market share 24

Figure 2.7: Developed Asia-Pac AMI meter hardware market share 25

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List of Figures, Boxes, and Tables (cont.)

- Figure 2.8: Developing Asia AMI meter hardware market share 26
- Figure 2.9: Global (ex. China) AMI communications market share 27
- Figure 2.10: Americas AMI communications market share 28
- Figure 2.11: EMEA AMI communications market share 29
- Figure 2.12: Asia-Pac (ex. China) AMI communications market share 30
- Figure 2.13: Global streetlight networking market share 31
- Figure 2.14: US streetlight networking market share 32
- Figure 2.15: US streetlight controllers/nodes market share 33
- Figure 3.1: Smart grid value chain 34
- Figure 3.2: Cumulative global AMI forecast by segment 35
- Table 3.1: Leading global smart metering vendors 35
- Figure 3.3: Leading smart metering vendors 36
- Figure 3.4: Cumulative global DA forecast by segment 37
- Figure 3.5: Leading DA vendors 38
- Table 3.2: Leading global DA vendors 38
- Figure 3.6: Cumulative global forecast for other smart grid segments 39
- Table 3.3: Leading global smart grid vendors (other segments) 40
- Figure 3.7: Leading global smart grid vendors (other segments) 40
- Figure 3.8: Smart water value chain 41
- Figure 3.9: Global cumulative smart water deployments by segment 42
- Table 3.4: Leading global smart water vendors 42
- Figure 3.10: Leading smart water vendors 43
- Figure 3.11: Smart lighting value chain 44
- Figure 3.12: Cumulative investment in LED and smart streetlights 45
- Table 3.5: Leading global smart street lighting vendors 45
- Figure 3.13: Leading smart street lighting vendors 46
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