

**northeast** group, llc

Global Smart Infrastructure Vendor Landscape

*Smart grid*

*Smart water*

*Smart cities*

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## Global Smart Infrastructure Vendor Landscape

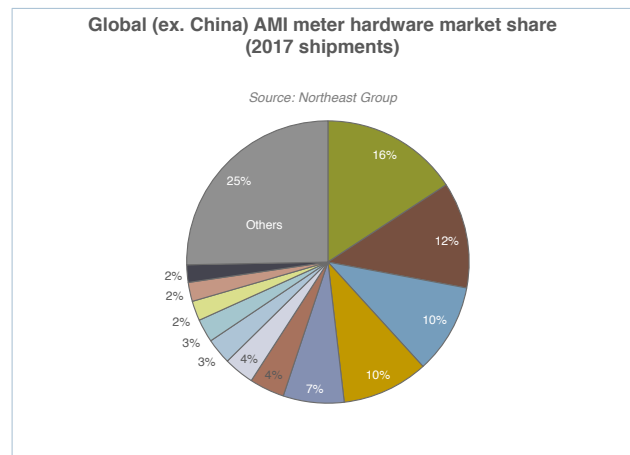
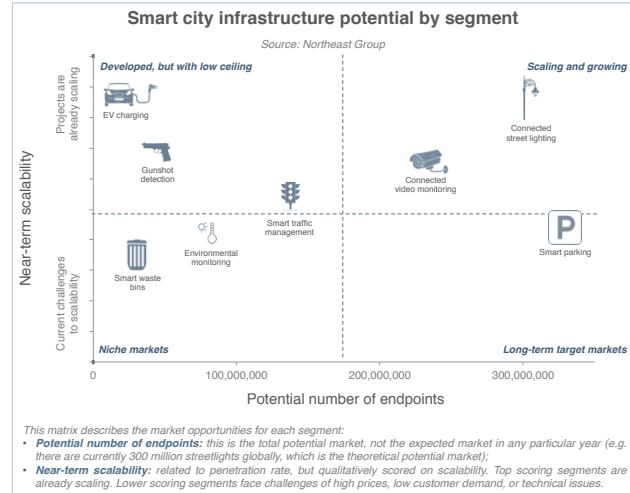
The smart infrastructure vendor landscape is undergoing a period of dramatic change. A market that for years was dominated by vendors providing metering, smart grid infrastructure and communications to the utility sector is now increasingly focused on broader smart cities opportunities, analytics, and 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.



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