

# Smart Metering in Europe

**Smart Metering in Europe** is the tenth consecutive report from Berg Insight analysing the latest developments for smart metering in Europe.

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- **Full coverage** of the European market with in-depth market profiles of all countries in EU28+2.
- **Case Studies** of smart electricity and gas metering projects by the leading energy groups in Europe.
- **360-degree** overview of next generation standards for PLC and RF smart grid communication.
- **Updated profiles** of the key players in the metering industry.
- **Revised market forecasts** lasting until 2019.
- **Summary** of the latest developments in the European energy industry.

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## Installed base of smart electricity meters to reach 170 million in Europe by 2019

EU28+2 has 281 million metered electricity customers and the annual demand for electricity meters for new installations and replacements is in the range of 12–17 million units. Penetration for smart meters, providing more comprehensive functionality than basic meter data collection, was 22 percent at the end of 2013. By 2019, Berg Insight projects that the rate will increase to 60 percent, driven by large rollouts in Spain, France and the UK, in combination with nationwide rollouts in several smaller countries. The installed base of smart electricity meters is forecasted to grow at a compound annual growth rate of 18.5 percent between 2013 and 2019 to reach 170.1 million units at the end of the period. The high growth rate will slow down towards the end of the decade as nationwide rollouts in Spain and the UK are completed. Germany's decision to not move ahead with a rollout until 2020 will most likely delay the widespread introduction of smart metering in the country until the mid-2020s.

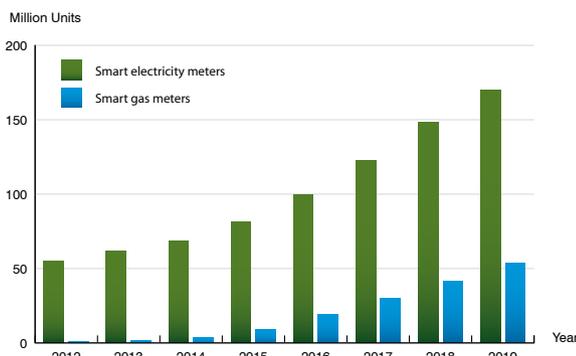
Europe's national governments play a key role for the adoption of smart metering. The EU's highly publicised 20/20/20 targets merely include a recommendation for the member states to evaluate the technology and introduce it – if there is a positive business case. Over the past years, almost all European countries have performed cost benefit analyses of smart metering and the majority of the cases have resulted in a recommendation to go ahead with a rollout. At the end of 2013, thirteen European countries had developed regulatory roadmaps for the full-scale introduction of smart electricity meters and at least five more were close to making the same decision. Seven countries have also committed to nationwide rollouts of smart gas meters. The UK has the most extensive smart metering program where 53 million electricity and gas meters will be networked through 30 million wireless communications hubs before 2020. France plans to begin deployments of 35 million PLC smart meters relatively soon and in Spain, the utilities are already well underway with the upgrading of around 29 million smart meters.

The year 2013 marked a major breakthrough for the use of wireless technologies in the European smart metering market. The UK broke with the trend from Italy, Spain and France and opted for a combination of cellular and wireless mesh technologies. Telefónica was selected as

the communication service provider for around 70 percent of the population and will install around 23 million communication hubs in what will become the world's largest wireless M2M deployment to date. The operator's 2G/3G network will offer sufficient coverage for around 98 percent of the population in its service territory by 2020, while the remaining 2 percent will be effectively covered with small scale wireless mesh networks. Arqiva will serve the remaining 30 percent of the UK population with a long-range radio network, based on Sensus' FlexNet technology platform. In the Netherlands, Alliander announced the decision to build a private CDMA450 network in partnership with KPN to use as its communications platform for smart metering and other smart grid applications.

During 2014, Berg Insight expects an increasing level of activity in many European countries, as planned mass-rollouts get underway. The DSOs in Austria and Norway are expected to announce their selection of vendors and technology solutions to enable installations to begin towards the end of the year. Poland will see further expansion of pilot projects, presumably resulting in more clarity on how the full nationwide rollout will unfold. In the Netherlands and the UK, the rates of installation are expected to pick up speed as the final issues related to the respective rollouts are being sorted out. A key milestone for the UK will be the establishment of the DCC organisation for managing smart meter communications and data. In France, a second major smart meter pilot is expected as a preparation for the mass-rollout.

Over the coming years, the adoption of smart gas metering will start to accelerate from low levels in the coming years, driven by combined electricity and gas rollouts in the UK and the Netherlands, as well as standalone deployments in France and Italy. Berg Insight forecasts that the installed base of smart gas meters is forecasted to grow at a compound annual growth rate of 75.9 percent between 2013 and 2019 to reach 53.4 million units at the end of the period and a penetration rate of 45 percent.



Installed base of smart meters (EU28+2 2012–2019)

### This report answers the following questions:

- Which European countries had positive results from their cost benefit analyses of smart metering?
- Which are the latest European countries to announce smart meter mandates?
- Who are the leading adopters of smart metering in Central and Eastern Europe?
- How are smart meter deployments proceeding in France, Spain and the UK?
- What are the plans for smart gas meter rollouts until 2019?
- Why are wireless technologies gaining market share?
- Who are the leading suppliers of smart metering solutions for the European market?
- Which are the main providers of PLC and wireless communication technology for smart meters?
- How are ICT providers positioning themselves in the value chain?

**Executive summary**

**1 Electricity, gas and district heating markets in Europe**

- 1.1 Energy industry players
- 1.2 Electricity market
- 1.3 Gas market
- 1.4 District heating market

**2 Smart metering solutions**

- 2.1 Introduction to smart grids
- 2.2 Smart metering
  - 2.2.1 Smart metering applications
  - 2.2.2 Smart metering infrastructure
  - 2.2.3 Benefits of smart metering
- 2.3 Project strategies
  - 2.3.1 System design and sourcing
  - 2.3.2 Rollout and integration
  - 2.3.3 Implementation and operation
  - 2.3.4 Communicating with customers
- 2.4 Regulatory issues
  - 2.4.1 Models for the introduction of smart meters
  - 2.4.2 Standards and guidelines
  - 2.4.3 Individual rights issues

**3 Networks and communication technologies**

- 3.1 Smart grid communication networks
  - 3.1.1 Smart grid network architecture
  - 3.1.2 Communication technology options
- 3.2 PLC technology and vendors
  - 3.2.1 International standards organisations
  - 3.2.2 G3-PLC
  - 3.2.3 PRIME
  - 3.2.4 Meters & More
  - 3.2.5 LonWorks
  - 3.2.6 HomeGrid
  - 3.2.7 HomePlug
  - 3.2.8 Semiconductor companies
- 3.3 RF technology and vendors
  - 3.3.1 International standards organisations
  - 3.3.2 Wi-SUN
  - 3.3.3 ZigBee
  - 3.3.4 Z-Wave
- 3.4 Cellular technology and vendors
  - 3.4.1 2G networks
  - 3.4.2 3G and 4G networks
  - 3.4.3 Cellular M2M module vendors
- 3.5 Low power wireless technology and vendors
  - 3.5.1 Sigfox
  - 3.5.2 Weightless

**4 Smart metering industry players**

- 4.1 Meter vendors
  - 4.1.1 Landis + Gyr
  - 4.1.2 Itron
  - 4.1.3 Elster
  - 4.1.4 AEM
  - 4.1.5 Aidon
  - 4.1.6 Apator
  - 4.1.7 Circutor
  - 4.1.8 Diehl Metering
  - 4.1.9 EDMl Meters
  - 4.1.10 Elektromed
  - 4.1.11 Elgama Elektronika
  - 4.1.12 EMH Metering
  - 4.1.13 Energomera
  - 4.1.14 GE Digital Energy
  - 4.1.15 Hager
  - 4.1.16 Hexing Electrical
  - 4.1.17 Holley Metering
  - 4.1.18 Iskraemeco
  - 4.1.19 Janz
  - 4.1.20 Kaifa Technology

- 4.1.21 Kamstrup
- 4.1.22 Linyang Electronics
- 4.1.23 Orbis
- 4.1.24 RIZ
- 4.1.25 Sagemcom
- 4.1.26 Sanxing Electric
- 4.1.27 Secure Meters
- 4.1.28 Sogecam
- 4.1.29 VIKO
- 4.1.30 Wasion
- 4.1.31 ZIV
- 4.1.32 ZPA Smart Energy
- 4.2 Smart grid networking and solution providers
  - 4.2.1 ADD Grup
  - 4.2.2 Ambient
  - 4.2.3 AP Systems
  - 4.2.4 Connode
  - 4.2.5 Corinex
  - 4.2.6 Cyan Technology
  - 4.2.7 Dr Neuhaus
  - 4.2.8 Echelon
  - 4.2.9 NURI Telecom
  - 4.2.10 Ormazabal
  - 4.2.11 Sensus
  - 4.2.12 Siemens
  - 4.2.13 Silver Spring Networks
  - 4.2.14 Trilliant
  - 4.2.15 Xemex
- 4.3 Smart metering software and data analytics solution providers
  - 4.3.1 C3 Energy
  - 4.3.2 Cuculus
  - 4.3.3 Ecologic Analytics
  - 4.3.4 eMeter
  - 4.3.5 Enoro
  - 4.3.6 Ferranti Computer Systems
  - 4.3.7 Görlitz
  - 4.3.8 Kisters
  - 4.3.9 Netinium
  - 4.3.10 Opower
  - 4.3.11 Oracle
  - 4.3.12 Powel
  - 4.3.13 SAP
  - 4.3.14 Telecontrol STM
- 4.4 System integrators and communication service providers
  - 4.4.1 Arqiva
  - 4.4.2 Atos Worldgrid
  - 4.4.3 Capgemini
  - 4.4.4 CGI
  - 4.4.5 Deutsche Telekom
  - 4.4.6 Eltel Networks
  - 4.4.7 Embriq
  - 4.4.8 Ericsson
  - 4.4.9 IBM
  - 4.4.10 Kapsch
  - 4.4.11 Maingate
  - 4.4.12 Omnetric Group
  - 4.4.13 Schneider Electric
  - 4.4.14 Telefónica
  - 4.4.15 Telekom Austria
  - 4.4.16 TeliaSonera
  - 4.4.17 Vodafone

**5 Market profiles**

- 5.1 Regional summary
  - 5.1.1 EU smart metering policies
  - 5.1.2 National smart metering policies
  - 5.1.3 Top smart metering projects in EU28+2 countries
- 5.2 Austria
- 5.3 Belgium
- 5.4 Bulgaria
- 5.5 Croatia
- 5.6 Cyprus
- 5.7 Czech Republic

- 5.8 Denmark
- 5.9 Estonia
- 5.10 Finland
- 5.11 France
- 5.12 Germany
- 5.13 Greece
- 5.14 Hungary
- 5.15 Ireland
- 5.16 Italy
- 5.17 Latvia
- 5.18 Lithuania
- 5.19 Luxembourg
- 5.20 Malta
- 5.21 Netherlands
- 5.22 Norway
- 5.23 Poland
- 5.24 Portugal
- 5.25 Romania
- 5.26 Slovakia
- 5.27 Slovenia
- 5.28 Spain
- 5.29 Sweden
- 5.30 Switzerland
- 5.31 United Kingdom

**6 Case studies: Smart metering projects in Europe**

- 6.1 Enel
  - 6.1.1 The Telegestore project in Italy
  - 6.1.2 New generation of smart meters and system solutions
  - 6.1.3 Endesa's smart metering project in Spain
  - 6.1.4 Smart meter rollout plan for Romania
- 6.2 ERDF
  - 6.2.1 The Linky Programme
  - 6.2.2 System development and full-scale pilot
- 6.3 E.ON
  - 6.3.1 Sweden: Initial experiences from a smart meter rollout
  - 6.3.2 Spain and the UK: Complete rollouts before 2020
  - 6.3.3 Germany and Central Europe: Pilot projects and retail propositions
- 6.4 Iberdrola
  - 6.4.1 The PRIME project
  - 6.4.2 Smart metering rollout in Spain
- 6.5 GrDF
- 6.6 Alliander
  - 6.6.1 Early smart metering activities
  - 6.6.2 CDMA450 smart grid communication network plans
- 6.7 Energa
- 6.8 The UK Smart Meter Implementation Programme
  - 6.8.1 Arqiva's FlexNet radio solution for the North
  - 6.8.2 Telefónica's cellular and mesh solution for the Centre and South

**7 Market forecasts and trends**

- 7.1 Market trends
  - 7.1.1 National governments decide if and when rollouts take place
  - 7.1.2 No end in sight for market fragmentation
  - 7.1.3 Wireless communication technologies gain traction
  - 7.1.4 ICT providers take a more prominent place in the value chain
- 7.2 Smart electricity metering market forecast
  - 7.2.1 Geographical markets
  - 7.2.2 Capital expenditure forecast
  - 7.2.3 Communication technology market shares
- 7.3 Smart gas metering market forecast

**Glossary**

## About the Author



**Tobias Ryberg** is co-founder and principal analyst responsible for the M2M research series. He is an experienced analyst and author of numerous articles and reports about telecom and IT for leading Swedish and international publishers. The European Smart Metering market has been his major research area for the past 11 years.

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