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.

This strategic research report from Berg Insight provides you with over 260 pages of unique business intelligence, including 5-year industry forecasts, expert commentary and real-life case studies on which to base your business decisions.

Highlights from the tenth edition of this report:

- **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.

Order now!
Please visit our web site to order this report and find more information about our other titles at **www.berginsight.com**

See inside for further details →

Berg Insight's M2M Research Series

What are the key business opportunities in the emerging wireless M2M market? Berg Insight's M2M Research Series is a unique series of market reports published on a quarterly basis. Each title offers detailed analysis of a specific vertical application area such as smart metering, fleet management or vehicle telematics. Once per year we also publish summaries of our research with detailed forecasts for the Global and European wireless M2M markets, respectively.

www.berginsight.com

BERG INSIGHT

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.
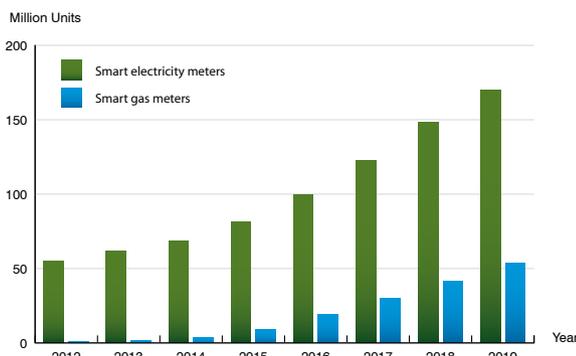
Europe's national governments play a key role for the adoption of smart metering. The EU's highly publicised 20/20/20 targets merely include a recommendation for the member states to evaluate the technology and introduce it – if there is a positive business case. Over the past years, almost all European 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.

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?

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

Table of Contents

About the Author

s-o.se

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.

Berg Insight offers premier business intelligence to the telecom industry. We produce concise reports providing key facts and strategic insights about pivotal developments in our focus areas. From time to time we also perform custom research assignments. Our vision is to be the most valuable source of intelligence for our customers.

© Berg Insight AB - No. 118

Who should buy this report?

Smart Metering in Europe in its tenth edition is the foremost source of information about the ongoing transformation of the metering sector (electricity and gas). Whether you are a vendor, utility, telecom operator, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

Related products

- Smart Homes and Home Automation
- Security Applications and Wireless M2M
- The Global Wireless M2M market
- M2M Applications in the Oil and Gas Industry

Order form — TO RECEIVE YOUR COPY OF SMART METERING IN EUROPE

You can place your order in the following alternative ways:
1. Place your order online in our web shop at www.berginsight.com
2. Fax this order sheet to us at fax number: +46 31 711 30 96
3. Mail this order sheet to us at: Berg Insight AB, Viktoriagatan 3, 411 25 Gothenburg, Sweden
4. Email your order to: info@berginsight.com
5. Phone us at +46 31 711 30 91

Choose type of format

☐ Paper copy ....1200 EUR
☐ PDF 1-5 user license ....1800 EUR
☐ PDF corporate license.......3600 EUR

Family/Surname	Forename	Position	Company
Address		Country	Postcode
Telephone	FAX	Email	

VAT is chargeable on all orders from Sweden. Orders from all other countries in the European Union must include the buyer's VAT Registration number below in order to avoid the addition of VAT.

Your PO number	Your VAT/TVA/IVA/BTW/MWST number

Please charge my credit card

☐ VISA ☐ Mastercard

Card number	Expiry date (MM/YY)	CV code

Cardholder's name / Signature

Billing address

Postcode / Country

Reports will be dispatched once full payment has been received. For any enquiries regarding this, please contact us. Payment may be made by credit card, cheque made payable to Berg Insight AB, Viktoriagatan 3, 411 25 Gothenburg, Sweden or by direct bank transfer to Skandinaviska Enskilda Banken, 106 40 Stockholm, Sweden.

Account Holder: Berg Insight AB
Account number: 5011 10 402 80
BIC/SWIFT: ESSESESS
IBAN: SE92 5000 0000 0501 1104 0280

☐ We enclose our cheque payable to Berg Insight AB
☐ Please invoice me

Signature / Date

BERG INSIGHT