



# Smart Metering in Europe

16th edition

*Smart Metering in Europe is the sixteenth consecutive report from Berg Insight analysing the latest developments for smart metering electricity and gas in Europe. This strategic research report from Berg Insight provides you with 310 pages of unique business intelligence, including 5-year industry forecasts, expert commentary and real-life case studies on which to base your business decisions.*

# Over 200 million smart electricity and gas meters now deployed

About 49 percent of the electricity customers in EU27+3 had a smart meter at the end of 2020 and the penetration rate is expected to reach 72 percent in 2026. Smart meters accounted for around 79 percent of the total electricity meter shipments in 2020. France was the largest market by volume with more than 6 million units shipped during the year. Italy, which is currently in the midst of its second rollout, was by far the second largest market with over 5 million units deployed. The UK, the Netherlands and Portugal were also in the top five in terms of shipment volumes. While the Covid-19 pandemic initially had a drastic impact on smart meter installation across Europe when it arrived in the first half of 2020, most projects however managed to resume to normal relatively fast and the market is now set for robust growth with a total of 133 million smart electricity meters to be deployed during 2021–2026.

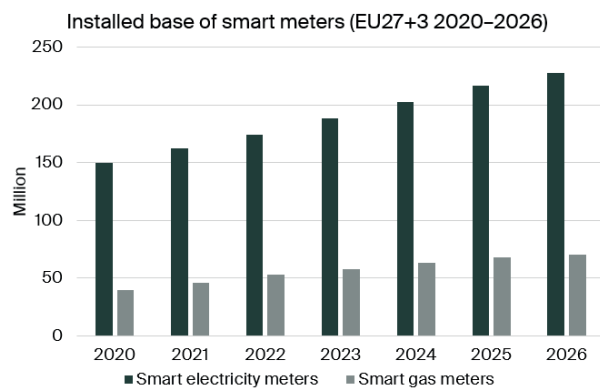
The majority of the new installations will take place in France and the UK, with significant contributions also coming from countries like Austria, Belgium, Poland and Portugal – and later on also Greece and Germany. Annual shipments will moreover be boosted by a growing number of second-wave rollouts in markets such as Italy, the Nordics, Spain and the Netherlands. In total, replacements of first-generation smart meters are expected to be in the range of 30–35 percent of total smart meter shipments in Europe throughout the next five years, or 5–7 million units annually.

While rollouts in many countries in Western Europe and the Nordics are now either well-advanced or largely completed, the focus is increasingly shifting to Central, East and Southeast Europe. The outlook for the region has improved significantly over the past two years with multiple major rollouts now planned or already under way. Overall, the CEE and Southeast European region is expected to account for as much as 41 percent of annual EU27+3 smart meter shipments in 2026, up from 9 percent in 2020. Looking only at the growth in annual shipment volumes of first-generation smart meter projects, all the 10 fastest growing markets are now found in CEE and Southeast Europe.

The rapid development of new wireless technologies for IoT communications has a major impact on the smart metering market in Europe. DSOs planning for new smart grid projects and rollouts in the 2020s have a wide range of increasingly sophisticated wireless technologies to choose from for their networking platforms. Wireless technologies have major advantages compared to PLC technologies which dominated the first wave of smart electricity deployments in Europe. Supported by massive R&D investments in the mobile

communications industry, 3GPP-based LPWA technologies such as NB-IoT and LTE-M are now rapidly gaining traction in the utilities space. Several major deployments utilising these technologies are now underway or about to begin in the Benelux, the Nordics and the Baltics. 3GPP-based LPWA will be the fastest growing technology group for smart metering connectivity during 2020–2026 with annual shipment volumes growing at a CAGR of 51 percent. Adoption of these technologies is nevertheless not expected to be uniform, with implementation more likely among small- to mid-sized utilities in the coming few years. At the moment, various forms of PLC remain the dominant technology group in terms of installed base although wireless communications options are forecasted to grow their share of annual shipments from 25 percent in 2020 to 57 percent in 2026.

Adoption of smart metering is also growing fast in the European gas distribution market. Berg Insight estimates that annual shipments of smart gas meters in the EU27+3 amounted to 6.5 million units in 2020. Demand will remain stable at around 7 million units per year until 2022, after which shipments are expected to gradually decrease following the completion of several nationwide rollouts. Italy was the largest market in 2020 with yearly shipments of 2.4 million units while France accounted for 2.0 million units. While shipments will decrease in Italy from 2020 and onwards, yearly shipments in France will stay at around 1.9–2.3 million units per year before dropping in 2023. After multiple delays, the UK market is expected to gradually ramp up smart gas meter installations to reach a peak of 3.4–3.6 million units during 2023–2025. A significant volume of smart gas meter installations is also anticipated in a number of small- and mid-sized countries over the coming years, including for example Belgium, Ireland, Lithuania, Greece and Poland.



# Table of contents

## 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 IoT networks and communications technologies

- 3.1 IoT network technologies
  - 3.1.1 Network architectures
  - 3.1.2 Unlicensed and licensed frequency bands
- 3.2 PLC technology and standards
  - 3.2.1 International standards organisations
  - 3.2.2 G3-PLC
  - 3.2.3 PRIME
  - 3.2.4 Meters & More
  - 3.2.5 OSGP
- 3.3 3GPP cellular and LPWA technologies
  - 3.3.1 2G/3G/4G/5G cellular technologies and IoT
  - 3.3.2 NB-IoT and LTE-M
  - 3.3.3 The role of cellular networks in smart meter communications
  - 3.3.4 LoRa
  - 3.3.5 Sigfox
- 3.4 Other RF technologies and standards
  - 3.4.1 IEEE 802.15.4
  - 3.4.2 Wi-SUN
  - 3.4.3 Proprietary IPv6 connectivity stacks based on 802.15.4
  - 3.4.4 EN 13757

### 4 Smart metering industry players

- 4.1 Meter vendors
  - 4.1.1 Itron
  - 4.1.2 Landis+Gyr
  - 4.1.3 Aclara (Hubbell)
  - 4.1.4 ADD Grup
  - 4.1.5 AEM
  - 4.1.6 Aidon
  - 4.1.7 Apator
  - 4.1.8 Circutor
  - 4.1.9 Diehl Metering
  - 4.1.10 EDM I
  - 4.1.11 EFR
  - 4.1.12 Elgama Elektronika (Linyang Energy)
  - 4.1.13 EMH Metering
  - 4.1.14 Flonidan
  - 4.1.15 Gridspertise (Enel)
  - 4.1.16 Hexing Electrical
  - 4.1.17 Honeywell
  - 4.1.18 Holley Technology
  - 4.1.19 Iskraemeco

- 4.1.20 Kaifa Technology
- 4.1.21 Kamstrup
- 4.1.22 MeterSit
- 4.1.23 Networked Energy Services
- 4.1.24 NIK
- 4.1.25 Pietro Fiorentini
- 4.1.26 Sagemcom
- 4.1.27 Sanxing Electric
- 4.1.28 Wasion
- 4.1.29 ZIV
- 4.1.30 ZPA Smart Energy (El Sewedy Electrometer)
- 4.1.31 ZTE Corporation
- 4.2 Communications solution providers
  - 4.2.1 APKAPPA
  - 4.2.2 CyanConnode
  - 4.2.3 Devolo
  - 4.2.4 NuriFlex
  - 4.2.5 Ormazabal
  - 4.2.6 Power Plus Communications
  - 4.2.7 Sensus (Xylem)
  - 4.2.8 Theben
  - 4.2.9 Toshiba
  - 4.2.10 Trilliant
  - 4.2.11 Xemex
- 4.3 Software solution providers
  - 4.3.1 Avance Metering
  - 4.3.2 Atlantica Digital
  - 4.3.3 Cuculus
  - 4.3.4 Embriq
  - 4.3.5 Hansen Technologies
  - 4.3.6 Ferranti
  - 4.3.7 Kisters
  - 4.3.8 Oracle
  - 4.3.9 Robotron Datenbank-Software
  - 4.3.10 SAP
  - 4.3.11 Siemens
  - 4.3.12 Telecontrol STM
  - 4.3.13 Terranova Software
  - 4.3.14 VIVAVIS
- 4.4 System integrators and communications service providers
  - 4.4.1 A1 Telekom Austria
  - 4.4.2 Arqiva
  - 4.4.3 Atos
  - 4.4.4 Capgemini
  - 4.4.5 CGI
  - 4.4.6 Com4
  - 4.4.7 Greenbird Integration Technology
  - 4.4.8 IBM
  - 4.4.9 Telecom Italia
  - 4.4.10 Telefónica
  - 4.4.11 Telenor
  - 4.4.12 Telia Company
  - 4.4.13 Utility Connect
  - 4.4.14 Vodafone

### 5 Market profiles

- 5.1 Regional summary
  - 5.1.1 EU energy strategy
  - 5.1.2 EU policies related to smart metering
  - 5.1.3 Smart metering policies on the national level
  - 5.1.4 Top smart metering projects in EU27+3 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 Enel Open Meter and the second-generation rollout in Italy
  - 6.1.2 Endesa's smart metering project in Spain
  - 6.1.3 Smart meter rollout in Romania
- 6.2 Enedis
  - 6.2.1 The Linky Programme
  - 6.2.2 System development and large-scale pilot
  - 6.2.3 Full-scale rollout
- 6.3 Current smart meter projects in four European countries
  - 6.3.1 Austria – Wiener Netze
  - 6.3.2 Belgium – Fluvius
  - 6.3.3 Ireland – ESB Networks
  - 6.3.4 Lithuania – ESO
- 6.4 Pioneering next-generation smart meter rollouts
  - 6.4.1 E.ON Sweden
  - 6.4.2 Elenia
- 6.5 Smart gas meter rollouts in France and Italy
  - 6.5.1 GRDF
  - 6.5.2 2i Rete Gas
- 6.6 Smart meter communications platforms in Germany and the UK
  - 6.6.1 Germany
  - 6.6.2 United Kingdom
- 6.7 Smart metering in Eastern Europe and the Balkans

### 7 Market forecasts and trends

- 7.1 Market trends
  - 7.1.1 Second-wave rollouts to account for a substantial share of shipments
  - 7.1.2 Growth increasingly driven by CEE and Southeast European projects
  - 7.1.3 Adoption of NB-IoT and LTE-M connectivity picking up speed
  - 7.1.4 Making smart metering systems secure by design
  - 7.1.5 Rethinking the smart metering offering to respond to emerging utility needs
  - 7.1.6 Europe gearing up for hydrogen supply operations
- 7.2 Smart electricity metering market forecast
  - 7.2.1 Capital expenditure forecast
  - 7.2.2 Communications technology market shares
- 7.3 Smart gas metering market forecast

### Glossary

## Highlights from the report

**Full coverage** of the European market with in-depth market profiles of all countries in EU27+3.

**Case studies** of smart electricity and gas metering projects by the leading energy groups in Europe.

**360-degree overview** of next-generation PLC, RF and cellular standards for smart grid communications.

**Updated profiles** of the key players in the metering industry.

**New detailed forecasts** for smart electricity and gas meters in 30 countries until 2026.

**Summary** of the latest developments in the European energy industry.

## Questions answered in the report

- Which are the major trends shaping the European smart metering market?
- What is the status and outlook for second-generation smart metering rollouts across Europe?
- Which new projects are utilising NB-IoT and LTE-M cellular communications?
- How do smart metering technology choices vary across Europe?
- How is the regulatory environment for smart metering evolving on the national level?
- Which are the largest utility companies in each country in Europe?
- Which are the leading suppliers of smart metering solutions for the European market?
- Which countries lead the adoption of smart gas meters?



## About Berg Insight's IoT market research

Our market reports offer comprehensive information and analysis on key IoT technologies and markets, addressing important concerns including total addressable market, market penetration, market shares, industry landscape, regulatory environment, market trends and forecasts. Our research portfolio today comprises more than 50 items, where each market report focuses on a specific vertical application area or cover horizontal themes. All market reports come with complementary data sets in Excel format that can be easily analysed and converted into tables and charts. We offer a range of different license options together with bundled packages and subscriptions to suit your specific needs.



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## Smart Metering in Europe

Are you looking for detailed information and comprehensive data about the European smart metering market (electricity and gas)? Berg Insight's analyst team has been covering smart metering continuously for more than sixteen years. Smart Metering in Europe is our flagship 310-page report covering AMM in EU27+3. Learn more about the EU energy policies driving the adoption of smart metering and the latest market developments in Europe. Extensive data Excel is included.

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## Who should buy this report?

Smart Metering in Europe in its sixteenth 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.

AUTHOR

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Levi is an industry expert within the fields of smart metering and smart cities, along with related networking technologies and standards. He is Berg Insight's lead analyst of smart electricity, gas and water metering research. Levi also heads research projects within emerging smart city verticals such as smart streetlighting, smart parking, smart waste management and smart city surveillance. Levi holds a Master's degree in Innovation and Industrial Management from the School of Business, Economics and Law at the University of Gothenburg and joined Berg Insight in 2018.

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