TECHNOLOGY, MEDIA & TELECOM ABSTRACT

Electric Grid Managed Services Report 2018

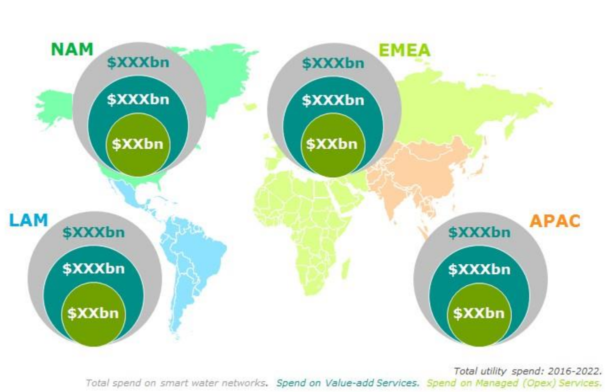
David Green, Smart Utility Infrastructure – Research Manager– January 2018

Over $47bn will be spent by electric utilities on smart metering hardware before the end of 2023 – but what about the market beyond the meter? Professional services based around AMI, software platforms and data analytics are already on the rise and new business models could yet transform the market for vendors, especially if utilities start to seek an "Outcomes as a Service" model.

This first edition report from IHS Markit takes a future look at the evolving market place for technology-based services to the electric utility, centred around the role of AMI and the all-important data. From applications such as the communications network, to meter data management software and analytics, the report will give market sizes and revenue projections for the next five years, including regional revenue projections for Software and Network as a Service.

In the following chapters, primary research interviews with utilities, vendors and other technology companies are combined to create analysis on the impact of new business models. For example, 'when will SaaS generate more revenue than Capex software spend?'

Example Figure – Managed Service Revenue (as a % of total service revenue)



Key Issues Addressed

- What are the technology services that utilities most need and willing to pay for right now and in the future?
- Does any particular region offer a greater opportunity for vendors?
- Which factors are key in determining the biggest ROIs for a utility?
- Will an 'outcomes as a service' model provide more revenue for vendors?
- Can AMI data services be a successful part of grid operation services and platforms?

Applicable To

- Metering hardware manufacturers
- Communications networking companies
- Combined AMI vendors
- Telecommunications
- Industrial software platform companies

ACTUALS AND FORECAST

Frequency, Time Period
- 5-year annual forecast (2017 - 2023)
- Base year (2016)

Measures
- Revenues (Services & Technologies)

Regions, Markets
- Europe
- Middle East and Africa
- North America
- Latin America
- Asia Pacific

TECHNOLOGIES AND SERVICES COVERED

- Meter Hardware
- Communications Hardware
- Communications Network
- Head-end Software
- Meter Data Management Software
- Network as a Service
- Software as a Service
- Metering as a Service

BUSINESS MODELS COVERED

- Traditional
- Professional Services
- Managed Services
- Outcomes as a Service
- Shared Benefits

LEAD ANALYST

David Green – Smart Utility Infrastructure, Research Manager

A frequent speaker at wireless power conferences and events across the globe, David leads a team of Wireless Power & Smart Utilities Infrastructure analysts at IHS Markit Technology on key technology trends and consumer analysis. More recently, David led a large custom study for a key client on the rise of managed services for the water utility sector.

David has previously worked within Video Surveillance Research at IHS Markit Technology and before that, spent five years working in an automotive technical consultancy on vehicle anti-theft, crime and security research. David holds a Bachelor's degree in Mechanical Engineering from Cardiff University and is based in the company's Wellingborough, UK office. David.Green@IHSMarkit.com.

ABOUT IHS TECHNOLOGY SMART UTILITY INFRASTRUCTURE COVERAGE

Our coverage of the smart utility infrastructure industry has spanned over 15 years, with a core focus on the growth of smart metering technology for water, gas, electricity and heat. Through our annual research and datasets, we have a long established and robust methodology to accurately size the market and forecast the future. Additional, large-scale custom projects for some of the biggest industry players have also seen us expand our knowledge and reach across the industry; from sizing the transmission and distribution grid hardware market, to exploring the future business models for managed services to water utilities. Our global research team is now launching a new syndicated research service to cover the transmission and distribution markets for electricity hardware.

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Note – the Excel file is able to filter by region, but also includes the raw pivot data table to allow clients to perform their own analysis.

For more information:
ihsmarkit.com/technology

WORLDWIDE
T +1 844 301 7334

E technology_us@ihsmarkit.com
technology_apac@ihsmarkit.com
technology_emea@ihsmarkit.com