



MIA

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Smart Grid Intelligence Service

Part of the Smart Buildings & Energy Infrastructure Service Area Package

Explore long-term opportunities across smart grid equipment and software solutions on top of a resilient digitalized energy system, with unique market insights and in-depth data.

OMDIA Energy & Smart Infrastructure TEAM

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The OMDIA logo consists of the letters 'O', 'M', 'D', 'I', and 'A' in a bold, sans-serif font. The 'O' is stylized with a circular arrow around its left side. The 'M' has a dot above its right vertical stroke. The 'D' has a dot above its top curve. The 'I' has a dot above its top bar. The 'A' has a dot above its top bar. The letters are black and set against a white background.

OMDIA

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Smart Grid Intelligence Service

*Part of the OMDIA Smart Buildings & Energy
Infrastructure Service Area Package*

HOW OMDIA HELPS YOU

- Comprehensive research, with database, analysis reports, insights, forecasts and market intelligence, to size the global market for smart grid technologies and products.
- Market shares split across region to help our clients understand competitive landscape and opportunities.
- In-depth analysis and insights into the full market: hardware/ equipment, connectivity and software solutions.

KEY QUESTIONS ADDRESSED

- What is the market size of the energy supply and storage industry by technology and application in each region? What is the annual shipment of the equipment, and the deployment of the software solutions?
- How does the competition look like in each market? What are the strategies for smart grid suppliers and service providers, and what are their market shares by region?
- How do utilities interact with residential/ commercial/ industrial buildings sector via smart grid? What are the barriers and opportunities for each vertical?
- What are the key applications that are driving (new) spend and unlocking various innovation budgets?

Smart Grid: Meet Our Expert Team



Thomas Lynch
Research Director,
Smart Infrastructure



Stephanie Wu
Senior Analyst,
Energy & Smart Grid



Ozge Celik Russell
Senior Analyst,
Smart Metering & Connectivity

Smart Grid Intelligence Service: Deliverables



DATABASE

—Annual—

Forecasts and market share estimates, delivered in Excel



BRIEFS & REPORTS

—Annual—

Market briefs offer analysis of and insights from the dataset; reports provide analysis of key technology trends and industry conferences



ANALYST INSIGHTS

—Ongoing—

Analyst commentary on market shifts, technology and regional developments, vendors, events, and more.



ANALYST ACCESS

—Ongoing—

For prompt responses to urgent and unique questions.

Smart Grid Intelligence Service: Research Methodology & Coverage

Methodology

- **Primary data** collection for quantitative and qualitative analyses. Quantitative data is gathered through completed questionnaires from major suppliers to the market, while face-to-face and telephone discussions with key equipment manufacturers provide insights and help identifying market qualitative trends.
- **Secondary research** is also performed to expand product and company knowledge, using company annual reports, business and financial press, manufacturers' brochures, data books and other technical literature.
- The service is also developed upon Omdia resources and knowledge covering each of the connected equipment domains included in the smart infrastructure architectures.

Coverage

Region

- North America: the U.S., Canada
- Western Europe: France, Germany, Italy, UK, Benelux, Nordics, Spain, Portugal, Switzerland, Austria, etc.
- Asia & Oceania: mainly Australia, Japan, China, South Korea, and Singapore
- Rest of World: India, Indonesia, the Middle East, etc.

Key focus

- Total view of the ON-GRID software and platforms
- Renewable energy supply and storage within the microgrid systems
- Vertical deep-dive into EV charging (incl. bi-directional charging) and grid load management
- Vertical deep-dive into private network application in grids
- Company profiles and case studies on leading players and key projects
- ESG news capture
- Utilities readiness

Solar Market Equipment Report: Research Coverage

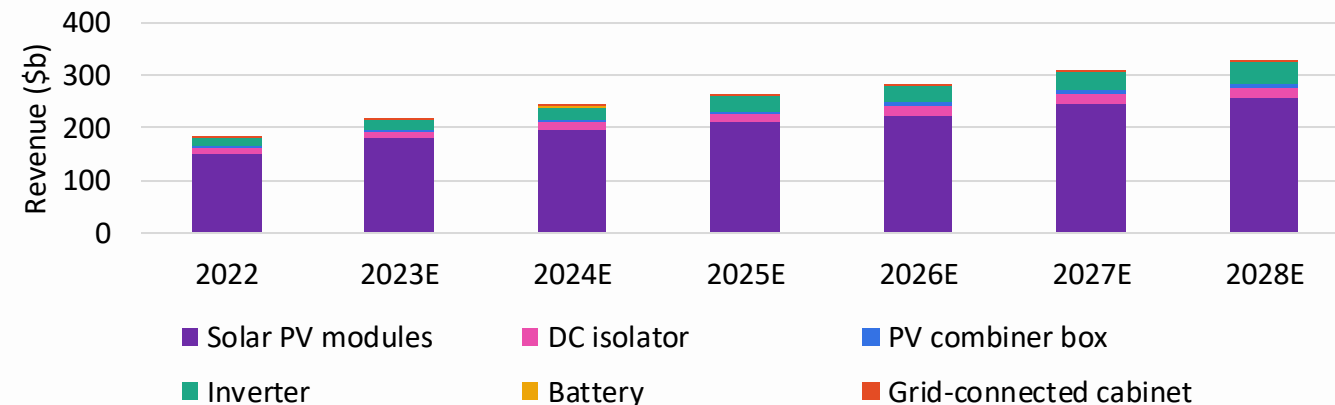
Category

- End-user vertical
 - Residential
 - Commercial & industrial
- Product category
 - Solar PV modules & equipment
 - DC isolator
 - PV combiner box
 - Inverter
 - Battery
 - Grid-connected cabinet
- Business model
 - Off-grid only
 - Off-grid & on-grid
 - On-grid only

Geographic Coverage

- Americas: United States, Latin America, etc.
- EMEA: France, Germany, Italy, UK, Benelux, Nordics, Spain, Portugal, Switzerland, Austria, Central Europe, Eastern Europe, Africa, the Middle East, etc.
- Asia & Oceania: China, India, Japan, South Korea, Singapore, Indonesia, Australia, etc.

Overall Solar PV connected system revenue by product



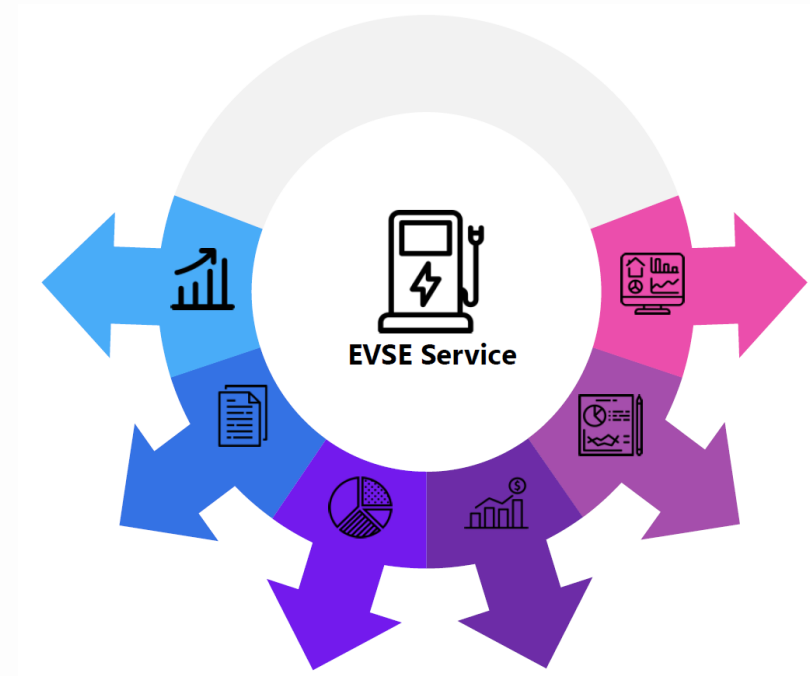
EV Charging Topical Report: Research Coverage

Category

- Charger families
 - AC
 - DC low power
 - DC high power
- Charger applications
 - Residential
 - Workplace
 - Destination
 - Enroute
- Vehicle types
 - Passenger EVs
 - Light Commercial EVs
 - e-Buses
 - e-Trucks

Geographic coverage

- Global



Tech trends analysis

- Global trends analysis split by residential, workplace, destination, and enroute

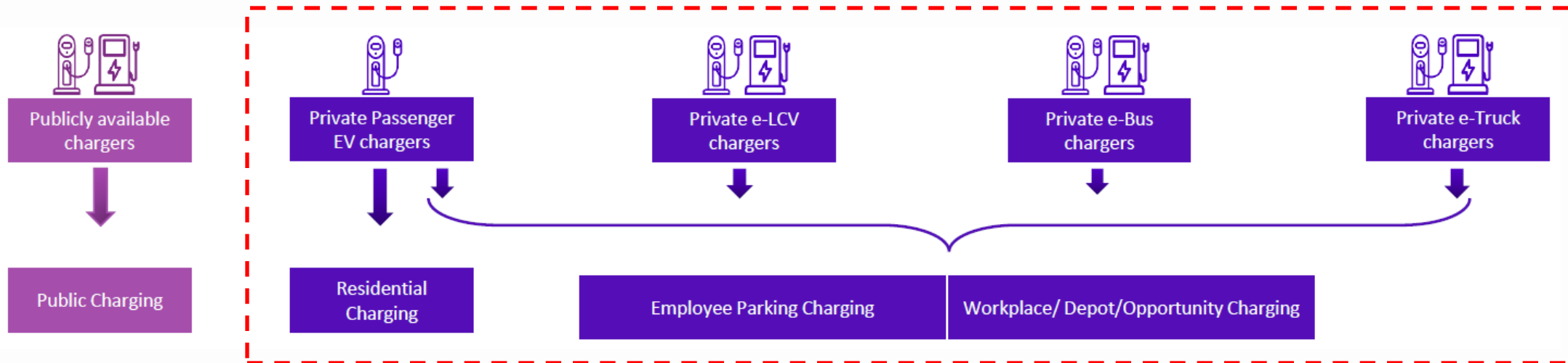
Company profiles

- Major players in EV charging equipment globally

Private Charging Definition & Segmentation

Chargers

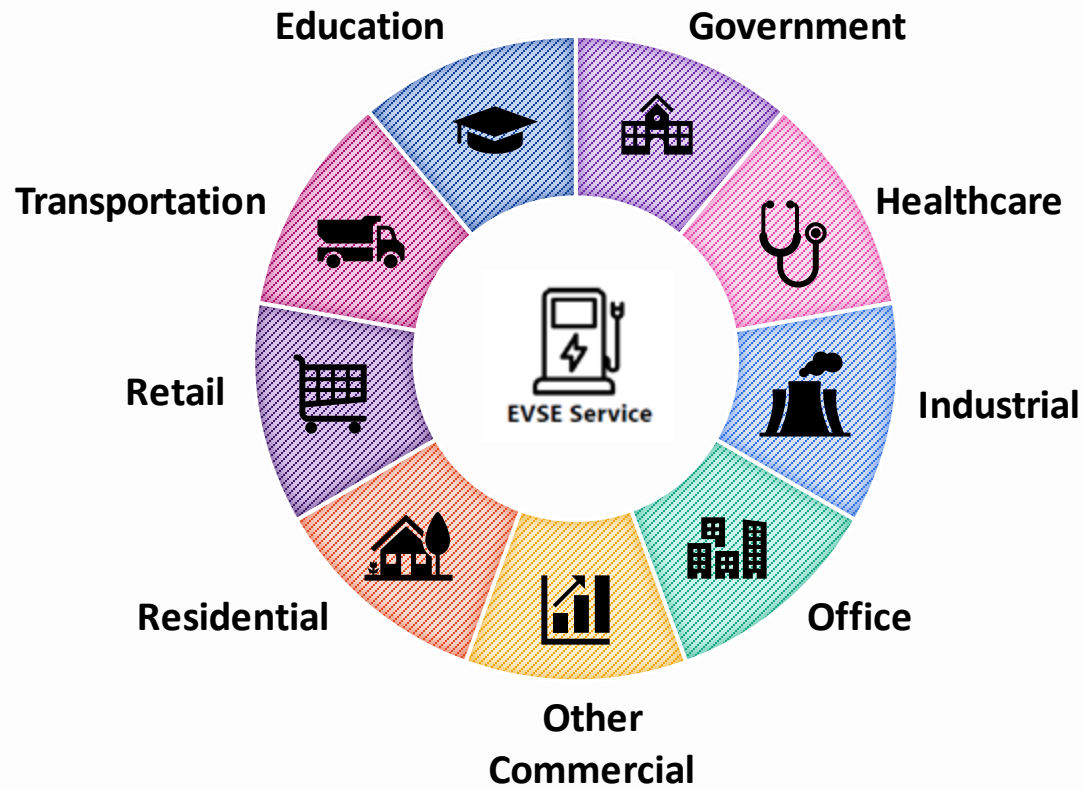
- **Charging point:**
Connects one vehicle at a time. A charging point usually has a dedicated parking space.
- **Private charging point:**
Charging infrastructure which is generally not accessible to public. This includes (but is not limited to) charging points installed in the parking lots of offices; residential dwellings; bus, light commercial vehicle (LCV) and truck depot charging; and opportunity chargers installed by transport companies at bus stops, etc.



Source: Omdia

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Private Charging by Vertical by Country



EMEA

- France
- Germany
- Italy
- Spain
- UK
- Rest of Western Europe
- Eastern Europe
- Middle East & Africa



Americas

- US
- Canada
- Latin America & the Caribbean

Asia & Oceania

- China
- Japan
- Southeast Asia
- Rest of Asia & Oceania

Technology Analysis & Surveys: Research Coverage

Energy Storage

Coverage includes:

- Introduction to energy storage systems and how they integrate into the smart grid
- Engagement strategies to utilities companies to ensure maximum value from storage capabilities
- Coverage on the key companies and product solutions involved

Private Network

Coverage includes:

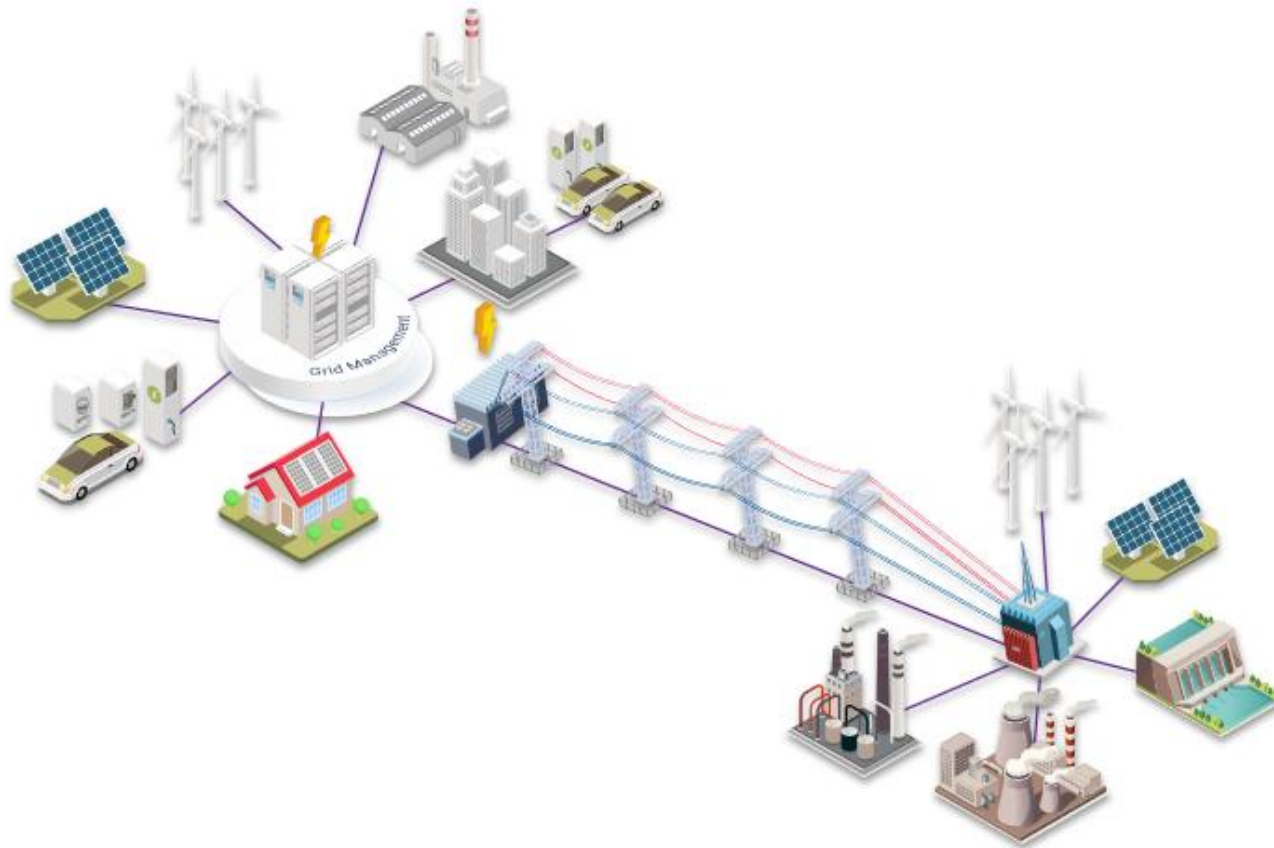
- What are the main demands of private networks on the smart grid
- Which private networks will be utilized to support smart grid evolution and the last-mile connectivity
- Regional policies and spectrum analysis
- Industry case scenarios and applications
- Future industry trends and developments

ITEI Survey

Coverage includes:

- Annual survey to over 5,200 IT enterprise decision makers from 56 countries across multiple industry sectors including utilities
- Key questions associated with smart grid investments and challenges
- Analysis to read key findings from survey results

Smart Grid Annual Report: Theme



Smart grid is an eco-system...

- **MONITOR, CONTROL, and OPTIMIZE** the electricity all the way from generation to consumption
- Enhance **RELIABILITY, EFFICIENCY, and SUSTAINABILITY** of the power network
- Balance **SUPPLY** and **DEMAND**

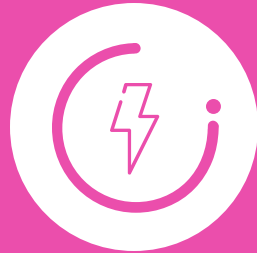
Smart grid is a critical element of smart infrastructure that intelligently connects the real world with the digital world. It allows decision making based on data and analytics, empowering end-users with their energy systems and processes in buildings and industries.

Smart Grid Annual Report: Research Coverage



Smart Electricity Meters

- Communicating meters
- Retrofit modules
- Advanced metering infrastructure (AMI)



Electric Vehicle (EV) Charging

- EVSE by charger family
- EVSE by capacity
- EVSE by application
- EVSE by end-user vertical



Energy Storage

- Behind-the-meter energy storage systems and equipment
- Hydrogen (electrolysis, fuel cell)
- EV bi-directional charging



Smart Home Devices

- Connected major home appliance
- Smart home energy efficiency management

**Scoping is still under process for the annual report. And we welcome discussions to build the coverage with our clients.*

Smart Grid Intelligence Service Publication Schedule for 2024

Reports published in 2023

Analyst Insight: Smart grid technologies in building a sustainable world
Survey Analysis: IT Enterprise Insights: Utilities 2024 report
Event Brief: Highlights from Enlit Asia and Enlit Europe 2023 events

Technology Analysis

Understand **Private Network application** in grids

Smart Grid Report

The 2024 edition of the flagship deliverable, with a profound database and analysis



Q1

Q2

Q3

Q4

Analyst Insight

An insight level product on **behind-the-meter solar equipment**

Topical Report

Take a deeper look into the top drivers and opportunities lie in the **EV charging** vertical

Technology Analysis

Discuss various **distributed energy storage** technologies and use cases

ITEI Survey

Analyse the latest drivers and challenges for **utilities in grid investment**

Smart Buildings & Energy Infrastructure Service Area Coverage



Smart Buildings

Connected Hardware Database

BMS & Energy Sustainability

HVAC & Heat Pumps Equipment

Building Automation Equipment Report

Building software platform tracker

Smart Buildings Survey

Commercial Building Insight

Energy Infrastructure

Smart Metering

AMI Connectivity

AMI Software & Services

Smart Grid

Smart Grid EV Charging

Smart Grid Private Networks

Energy Infrastructure End User Survey

About Omdia's

Smart Buildings and Energy Infrastructure Research

The Omdia Energy & Smart Infrastructure team brings together the areas of utility and smart grid, power and charging technologies, and smart building technologies. We help our clients track the evolution of industries from purely hardware driven, through the challenge of connectivity, and towards the future of software, services and solutions. Our global team of analysts bring unique insights to our market studies – with industry-leading expertise across subjects such as smart metering, wireless power and building management software. For the building technology market, we also harness the full power of Omdia to bring deep-dive analysis for building automation equipment, smart buildings, lighting, HVAC, and from our Physical Security team.

Our “Ask An Analyst” service provides best in class customer support.

Whether you need guidance to navigate the service, information regarding our methodologies or you want to better understand a data trend, Omdia’s support team is here to help.

Draw on our expertise

- Make the right decisions
- Sanity-check your own findings
- Get the most out of your subscription
- Understand more about our methodologies



Shelley Hunter
Customer Success
Manager



Kâren Dyer
Customer Success
Manager

Our Ask an Analyst service gives you direct contact via telephone, email or face-to-face session with our expert analyst team:



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