

# From Smart Metering to Smart Grid

## An International Perspective

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**Landis+Gyr AG**

# From Smart Metering ...

A **TOSHIBA**  
Group Company

## Turnover 2011

1.6 bn USD

- Americas 47%
- EMEA 35%
- AsiaPacific 17%

## R&D

7% of sales

## Customers

Over 8000

## Employees

>5,000

## R&D resources

850 in 17 R&D centers

## Manufacturing sites

16

## Operating entities

In 31 countries

## Sales offices

73

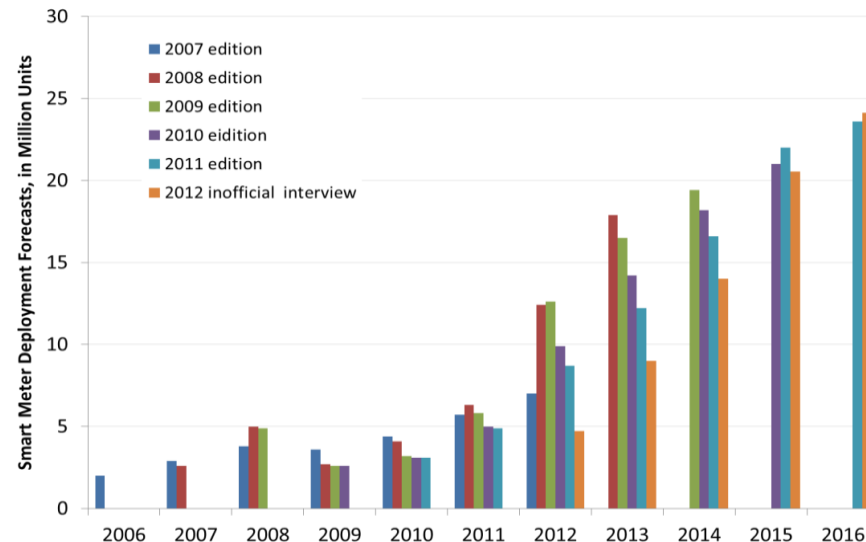
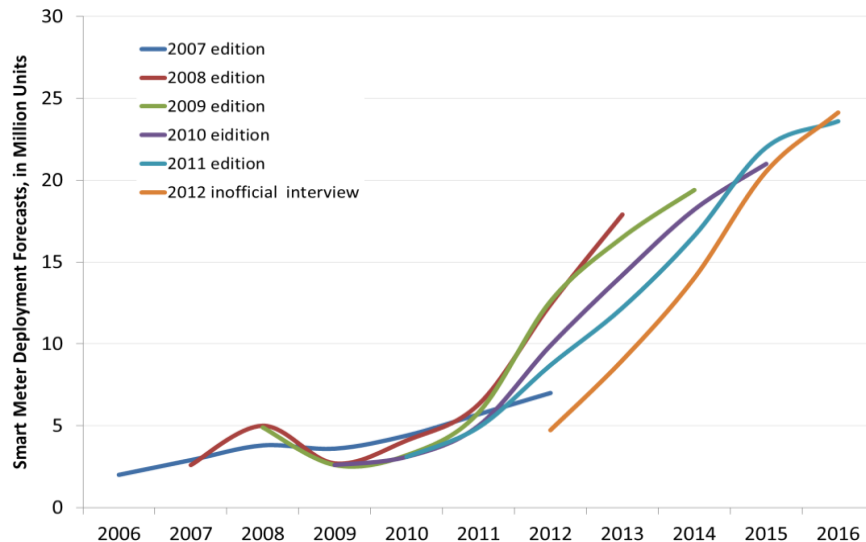
## More than a century of expertise in metering

- 300 million installed electricity meters
- 25+ years experience in Smart Metering



Landis  
|Gyr+  
manage energy better

# The European Smart Metering Market Forecast is shifting Year-on-Year (whilst the EU 3<sup>rd</sup> energy package targets remains)



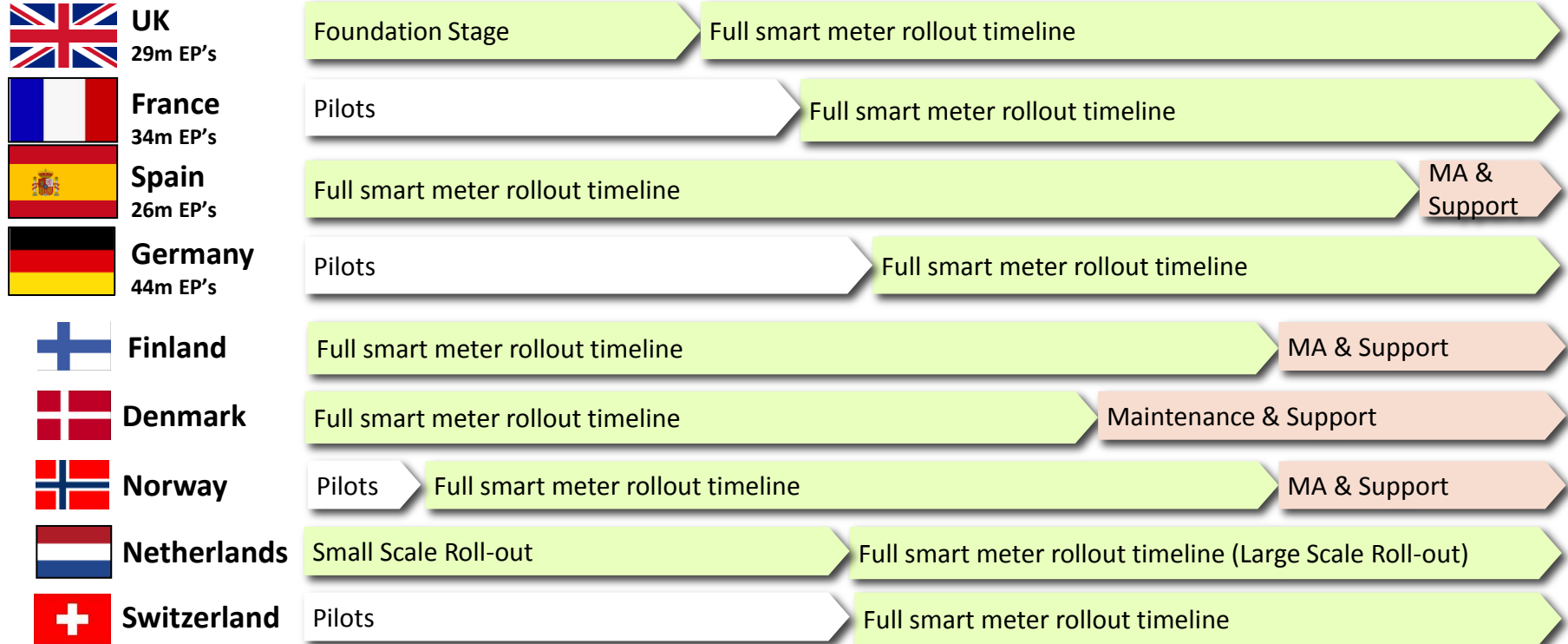
*Berg Insight market view 2012*

## Examples:

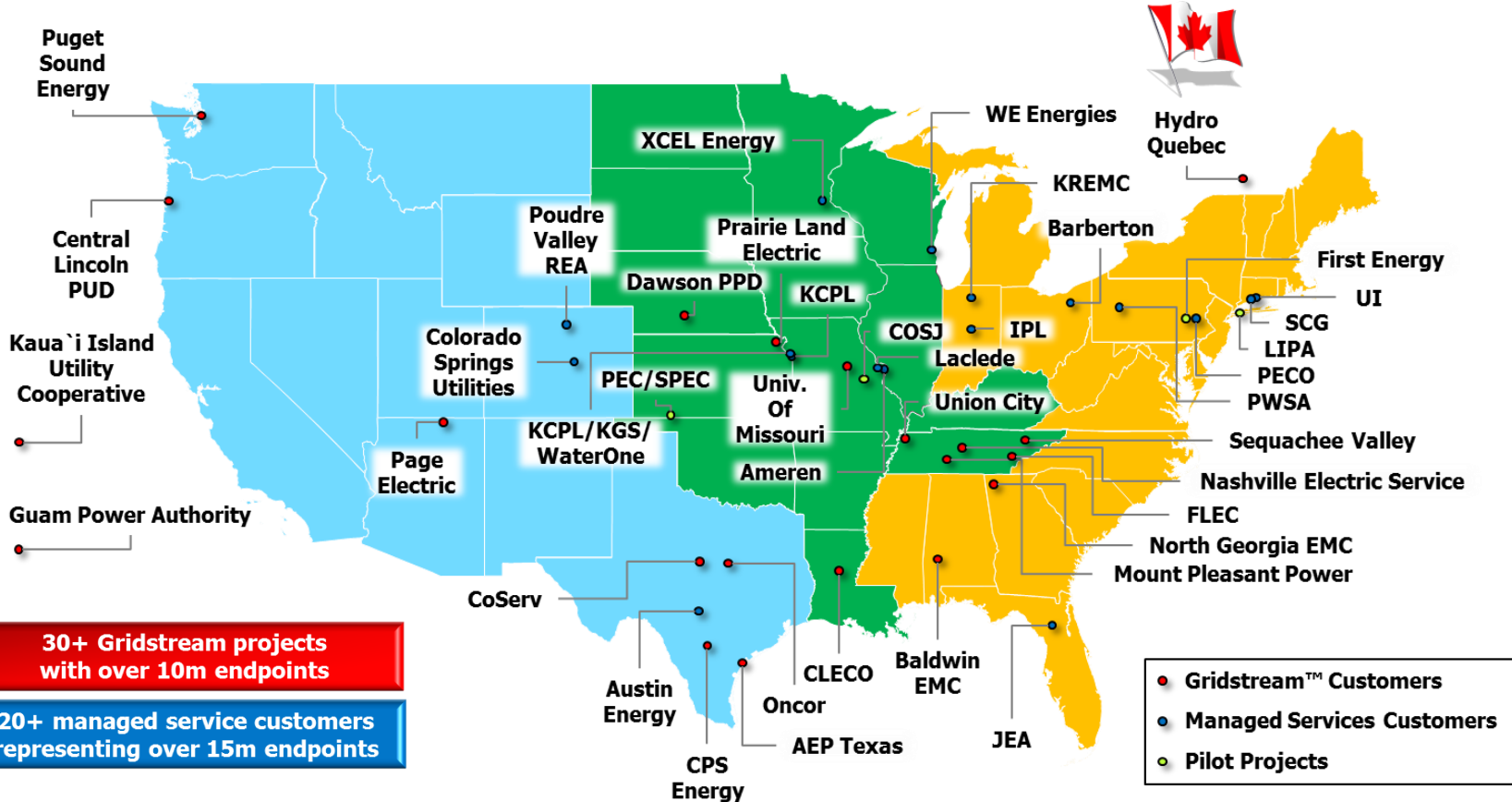
- UK:** Delay to finalization of market model + definition of standard
- France:** Postponement of next Linky (ERDF, France) tender by > 1 year
- Spain:** Push out of Iberdrola (Spain) / GNF (Gas Natural Fenosa) plans, economic slow down
- Germany:** In transition to a secure smart metering concept

# Smart Metering in Europe – Current Roadmaps

## Estimates By Country

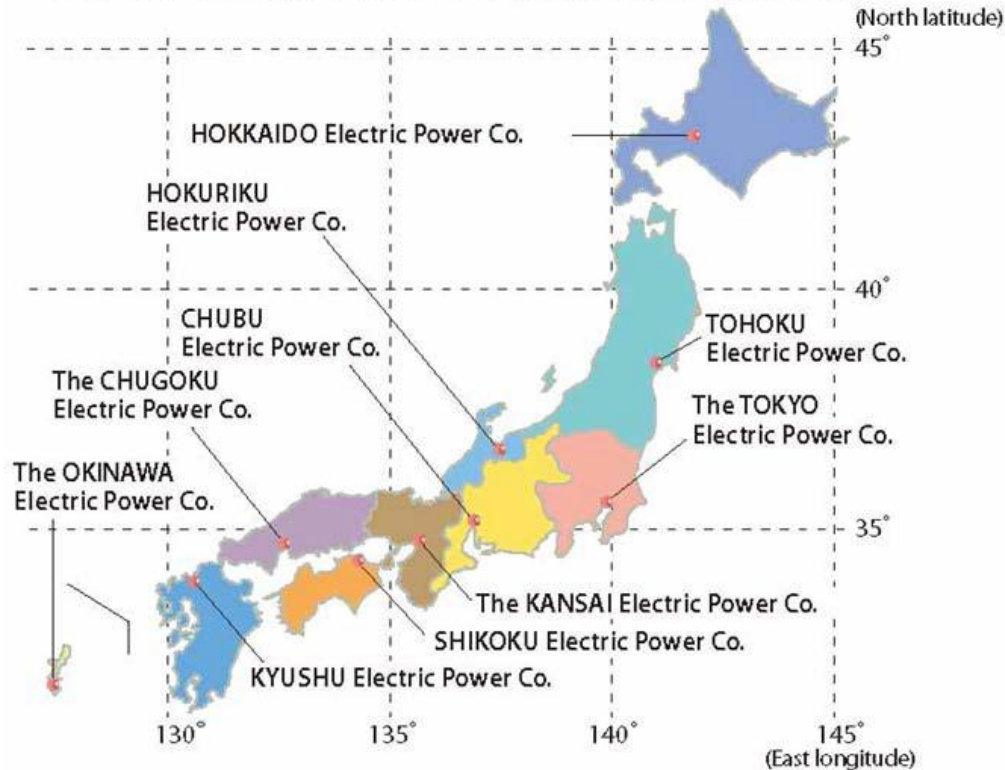


# L+G's Systems & Services Customer Base in North America



# And Japan?

The Ten Electric Power Companies by Service Area



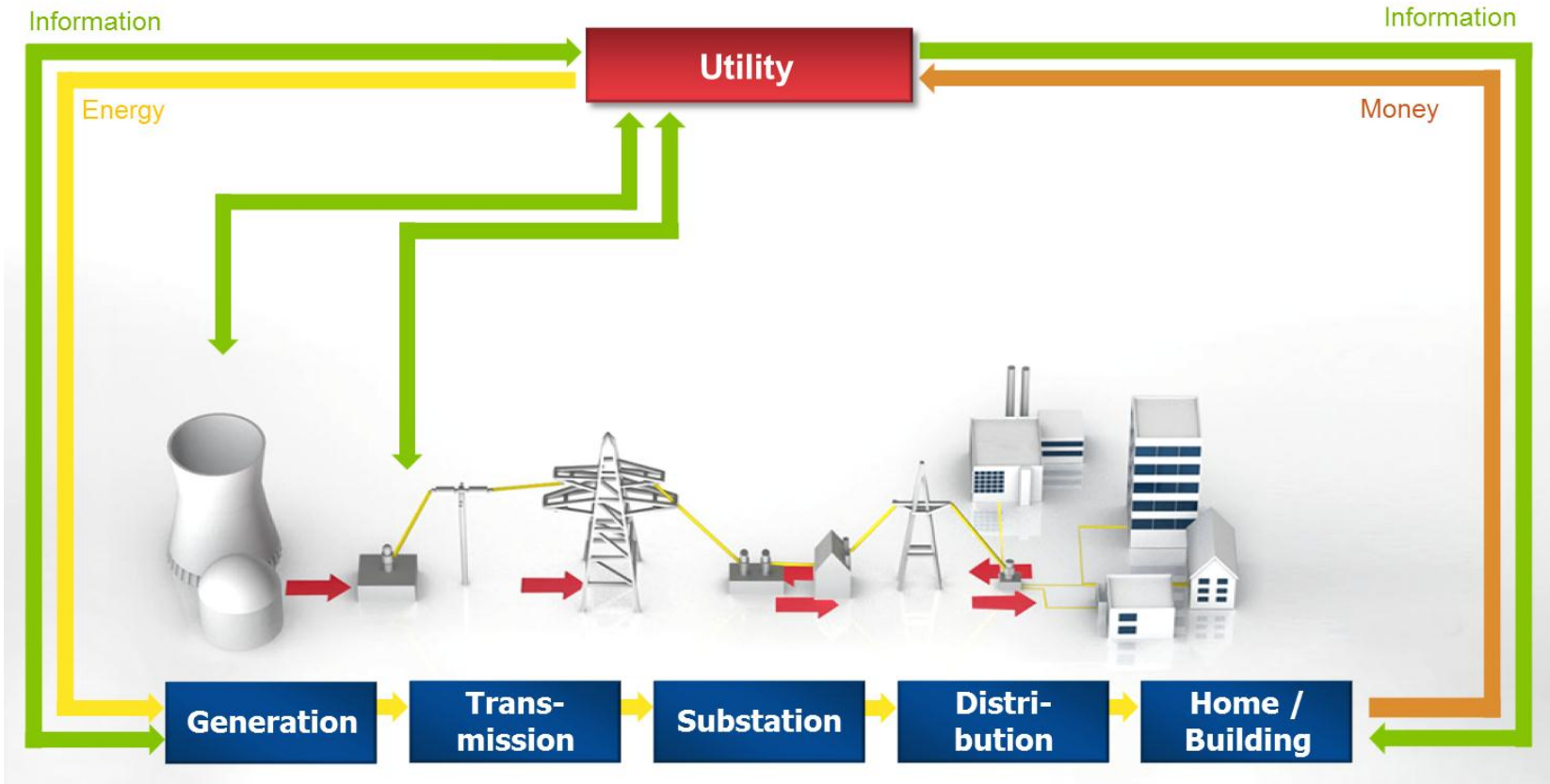
Utility	Scale (Residential)
Hokkaido	3.66 M
Tohoku	6.74 M
Tokyo	27.44 M
Chubu	9.46 M
Hokuriku	1.81 M
Kansai	12.77 M
Shikoku	2.73 M
Kyushu	8.23 M

## ... to Smart Grid

A **smart grid** is an electrical grid that uses information and communications technology to gather and act on information, such as information about the behaviors of suppliers and consumers, in an automated fashion to improve the efficiency, reliability, economics, and sustainability of the production and distribution of electricity.

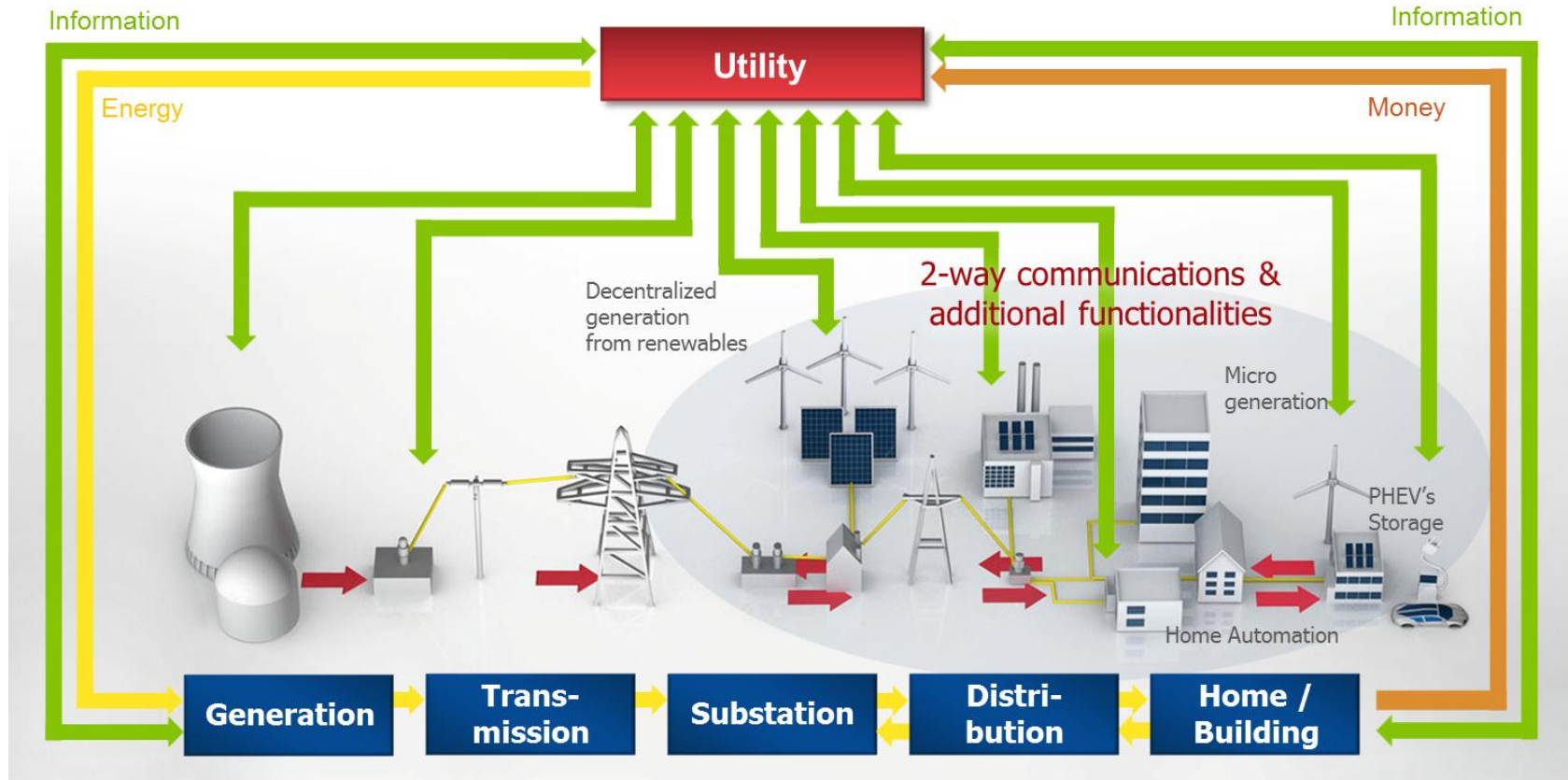
*Source: Wikipedia*

# The Past





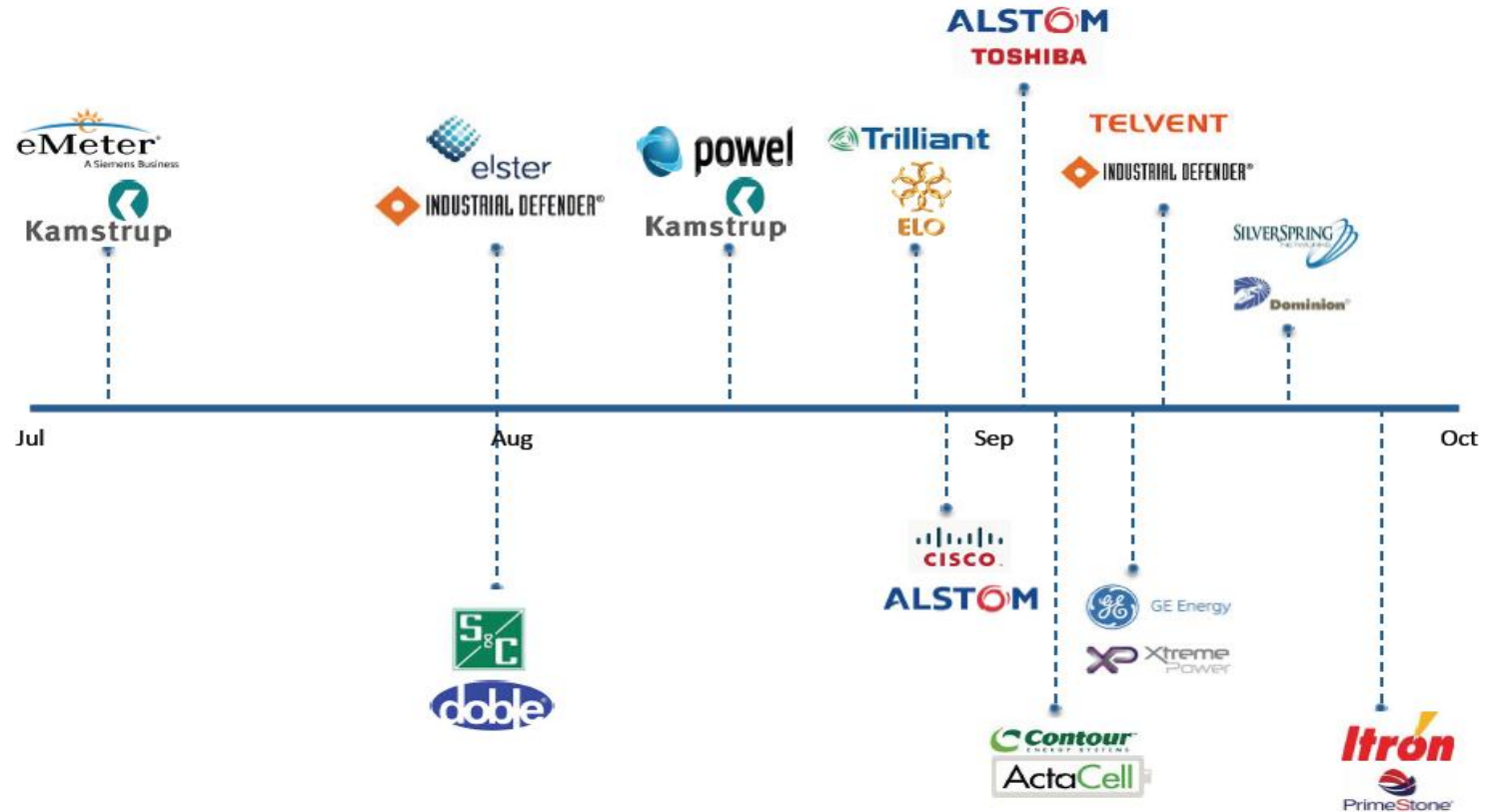
# The Future



# The Smart Grid Ecosystem Today

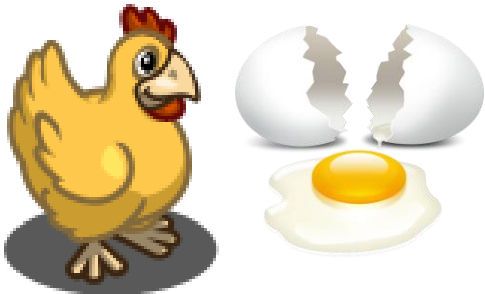


# 2H12: As Investment Activity Declines ... Partnerships Flourish



## Challenge #1

When should I start deploying SG tech?



## Advice #1

Deploy asap: basis for new business

## Challenge #2

What SG spec's should I use?

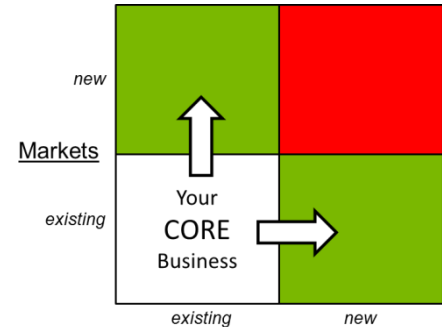


## Advice #2

Apply standards, build in flexibility

## Challenge #3

How to develop my SG business?



## Advice #3

As an incumbent, evolve from core

Thank you for your attention

