



RESEARCH REPORT

Executive Summary:

Smart City Tracker 1Q18

Global Smart City Projects by World Region,
Market Segment, Technology, and Application

NOTE: This document is a free excerpt of a larger report. Click on the link above to purchase the full report.

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Ryan Citron

Senior Research Analyst

Eric Woods

Research Director

Section 1

EXECUTIVE SUMMARY

1.1 Market Update

The fact that the Navigant Research *Smart City Tracker* now includes 221 cities around the world demonstrates the continuing drive to put innovation at the heart of city strategies globally. The number of ambitious projects has also increased substantially. Cities are developing more innovative programs and deploying proven solutions at commercial scale. Smart city solutions that integrate data and insights across multiple operations and service sectors are also becoming more common. Navigant Research expects the smart city market to continue to transition toward a higher integration of industry sectors as cities look to develop more coordinated strategies for their platform deployments and future communications needs.

Smart street lighting is increasingly being recognized by city leaders as a first step toward the development of a smart city. Growing numbers of pilot and large-scale commercial projects are demonstrating the value of using a smart street lighting network as a broader platform for smart city innovation. Additionally, smart parking systems, mobility solutions, air quality monitoring, and smart waste are also becoming more commonly deployed smart city applications.

These developments are happening in all major world regions, with recent surges of interest in North America and Australia, further acceleration of the Indian smart cities program, and continued development across Europe, Asia Pacific, Latin America, and the Middle East & Africa. The widespread interest in smart city programs is creating a growing market opportunity. Navigant Research estimates the global market for smart city solutions and services was worth \$40.1 billion in 2017. Smart city market revenue is projected to grow to \$94.2 billion by 2026, representing a compound annual growth rate of 9.9%.

1.2 Navigant Research Coverage

Navigant Research's *Smart City Tracker 1Q18* report provides an assessment of the current state of smart city development globally. This report tracks projects that aim to address the pressures on cities to meet three core goals: reduce environmental impact and greenhouse gas (GHG) emissions, encourage economic development, and deliver improvements in the efficiency and effectiveness of city services.

The *Tracker* covers projects focused on the industry sectors that have the most impact on these goals:

- Smart energy
- Smart water

- Smart transportation
- Smart buildings
- Smart government

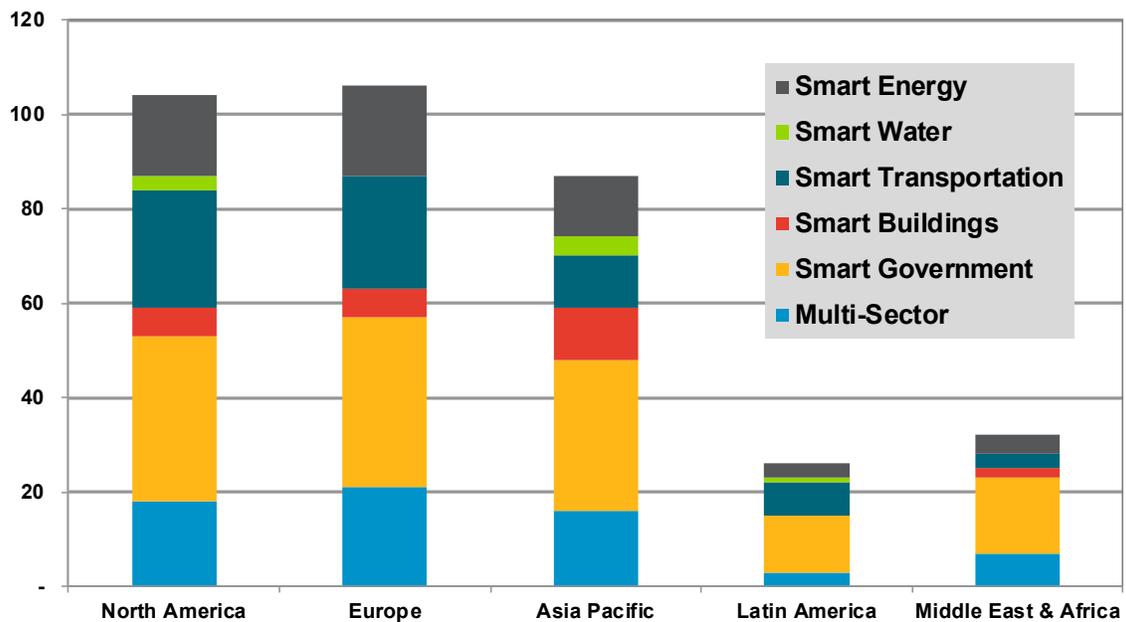
The 1Q 2018 version of the *Tracker* also includes a new category: multi-sector programs. This new category captures the evolution of the smart city market toward project deployments that cut across multiple industry sectors.

Navigant Research's *Smart City Tracker 1Q18* includes a comprehensive range of smart city project types, including policy initiatives, pilots/demonstrations, commercial deployments, sustainability programs, and city developments.

1.3 Smart City Projects

This *Tracker* includes 355 projects spanning 221 cities around the world. Of these, 16% of the projects primarily focus on energy; 2% on water; 20% on transportation; 7% on buildings; 37% on government; and 18% are multi-sector deployments. Europe is leading globally in terms of the number of smart city projects being pursued and the depth of multi-sector project integration. The number of cities engaged in smart city programs has also significantly increased in North America since the *Smart City Tracker 1Q17*, as 55 cities in the US and Canada are now included in the analysis.

Chart 1-1. Smart City Projects by Region and Primary Industry Sector, World Markets: 1Q 2018



(Source: Navigant Research)

Section 6

TABLE OF CONTENTS

Section 1	1
Executive Summary	1
1.1 Market Update	1
1.2 Navigant Research Coverage	1
1.3 Smart City Projects	2
Section 2	3
Tracking the Smart City Market	3
2.1 Defining the Scope	3
2.2 Smart City Trends	4
2.2.1 National Programs	4
2.2.2 Smart Street Lighting Leading the Way	5
2.2.3 Urban Mobility Innovations	5
2.2.4 Smart Cities and the Energy Transition	5
2.2.5 Evolution of the Smart City Platform	6
2.3 Projects by Region, Sector, and Type	7
Section 3	8
Regional Analysis	8
3.1 North America	8
3.2 Europe	9
3.3 Asia Pacific	11
3.4 Latin America	12
3.5 Middle East & Africa	14

Section 4	16
Industry Sectors	16
4.1 Overview	16
4.2 Smart Energy	18
4.3 Smart Water	19
4.4 Smart Transportation	19
4.5 Smart Buildings	20
4.6 Smart Government	21
4.7 Multi-Sector	21
Section 5	22
Acronym and Abbreviation List	22
Section 6	23
Table of Contents	23
Section 7	25
Table of Charts and Figures	25
Section 8	26
Scope of Study	26
Sources and Methodology	26
Notes	27

Section 7

TABLE OF CHARTS AND FIGURES

Chart 1-1.	Smart City Projects by Region and Primary Industry Sector, World Markets: 1Q 2018	2
Chart 3-1.	Smart City Projects by Primary Industry Sector, North America: 1Q 2018	8
Chart 3-2.	Smart City Projects by Primary Industry Sector, Europe: 1Q 2018	10
Chart 3-3.	Smart City Projects by Primary Industry Sector, Asia Pacific: 1Q 2018	11
Chart 3-4.	Smart City Projects by Primary Industry Sector, Latin America: 1Q 2018	13
Chart 3-5.	Smart City Projects by Primary Industry Sector, Middle East & Africa: 1Q 2018.....	15
Chart 4-1.	Smart City Projects by Primary Industry Sector, World Markets: 1Q 2018.....	16
Chart 4-2.	Percentage of Smart City Projects Involving Each Industry Sector, World Markets: 1Q 2018	17
Chart 4-3.	Percentage of Smart City Projects by Project Type, World Markets: 1Q 2018.....	18
Table 2-1.	Climate Action Plans of Selected Cities, World Markets	6
Table 2-2.	Smart City Projects by Region and Primary Industry Sector, World Markets: 1Q 2018	7
Table 2-3.	Smart City Projects by Region and Project Type, World Markets: 1Q 2018.....	7

Section 8

SCOPE OF STUDY

Navigant Research has prepared this report to provide participants in the emerging smart city technology market with a tracker of global smart city projects. The *Smart City Tracker 1Q18* includes commercial and pilot projects, as well as major policy initiatives, sustainability programs, and greenfield city developments. Navigant Research tracks projects across key industry sectors: smart energy, smart water, smart transportation, smart buildings, and smart government. This version of the *Tracker* also includes a new category, multi-sector programs, to capture the evolution of the smart city market toward project deployments that cut across multiple industry sectors. The *Smart City Tracker 1Q18* aims to provide a comprehensive documentation of the progress of smart city projects across all global regions and all relevant technologies.

SOURCES AND METHODOLOGY

Navigant Research's industry analysts utilize a variety of research sources in preparing Research Reports. The key component of Navigant Research's analysis is primary research gained from phone and in-person interviews with industry leaders including executives, engineers, and marketing professionals. Analysts are diligent in ensuring that they speak with representatives from every part of the value chain, including but not limited to technology companies, utilities and other service providers, industry associations, government agencies, and the investment community.

Additional analysis includes secondary research conducted by Navigant Research's analysts and its staff of research assistants. Where applicable, all secondary research sources are appropriately cited within this report.

These primary and secondary research sources, combined with the analyst's industry expertise, are synthesized into the qualitative and quantitative analysis presented in Navigant Research's reports. Great care is taken in making sure that all analysis is well-supported by facts, but where the facts are unknown and assumptions must be made, analysts document their assumptions and are prepared to explain their methodology, both within the body of a report and in direct conversations with clients.

Navigant Research is a market research group whose goal is to present an objective, unbiased view of market opportunities within its coverage areas. Navigant Research is not beholden to any special interests and is thus able to offer clear, actionable advice to help clients succeed in the industry, unfettered by technology hype, political agendas, or emotional factors that are inherent in cleantech markets.

NOTES

CAGR refers to compound average annual growth rate, using the formula:

$$\text{CAGR} = (\text{End Year Value} \div \text{Start Year Value})^{(1/\text{steps})} - 1.$$

CAGRs presented in the tables are for the entire timeframe in the title. Where data for fewer years are given, the CAGR is for the range presented. Where relevant, CAGRs for shorter timeframes may be given as well.

Figures are based on the best estimates available at the time of calculation. Annual revenue, shipments, and sales are based on end-of-year figures unless otherwise noted. All values are expressed in year 2018 US dollars unless otherwise noted. Percentages may not add up to 100 due to rounding.

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1375 Walnut Street, Suite 100
Boulder, CO 80302 USA
Tel: +1.303.997.7609
<http://www.navigantresearch.com>

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