

Smart Cities Market by Smart Transportation (Type, Solutions and Services), Smart Buildings (Type, Solutions and Services), Smart Utilities (Public Safety, Smart Healthcare, Smart Education, Smart Street Lighting, e-Governance), Smart Citizen Services, and Region - Global Forecast to 2025

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Abstracts

The increasing government initiatives, and rising adoption of connected and smart technologies are major factors expected to drive the growth of the smart cities market

The global smart cities market size is expected to grow from USD 410.8 billion in 2020 to USD 820.7 billion by 2025, at a Compound Annual Growth Rate (CAGR) of 14.8% during the forecast period. There is an upsurge in the adoption rate of advanced technologies across businesses. The development in 5G and NB-IoT technologies is expected to drive the growth of the smart cities market. With advancements, smart governments and other sectors would become highly intelligent and self-governing. For smart transportation, the 5G and NB-IoT technologies-based solutions would collect data from multiple sources and share it with a centralized control center by leveraging the benefits of cloud. Such advanced technologies are not only used to enrich the lives of citizens, but also in other areas such as security, privacy, and environmental sustainability.

Among focus areas, the smart citizen services segment is expected to account for the highest market share during the forecast period

Smart citizen services comprise smart education, smart healthcare, smart public safety, smart street lighting, and e-Governance. These services improve the overall efficiency

and quality of life of individuals in a city. Smart education helps students learn effectively by removing or minimizing time and distance constraints. Smart healthcare provides better healthcare solutions to citizens. Smart public safety and smart street lighting enhance the daily life experience of the citizens. This chapter provides a detailed overview of various smart citizen services solutions available in the market.

Among smart transportation, the roadway segment is expected to dominate the market during the forecast period.

It is often referred in context with the use of information and communications technology in road transport, including infrastructure and traffic management, as well as, in interfaces with the other modes of transport. Despite the rapid technological advancements in the automobile sector and the mobile devices sector, as well as, the emerging concept of connected vehicles, there have been no significant changes in the existing asphalt roads. With the growing number of urban demographics and increasing traffic congestions, it has become essential to innovate and improve the driving experience, particularly with respect to increasing road safety and reducing the cost overheads, which runs to billions of dollars, due to heavy traffic. Considering this, the US government and other major economies across Europe, as well as, certain parts of APAC have initiated or planned robust traffic management projects to ease traffic congestion, which is expected to be implemented in the next 5 to 10 years

Among regions, Asia Pacific (APAC) is expected to grow at the highest CAGR during the forecast period

APAC is expected to hold the highest CAGR among all regions, owing to the increasing adoption rate of IoT and rising demand for intelligent and smart solutions, while North America is expected to be the major contributor to the smart cities market. The increasing citizen empowerment and engagement is the major growth factor expected to drive the growth of the smart cities market.

In-depth interviews were conducted with Chief Executive Officers (CEOs), marketing directors, innovation and technology directors, and executives from various key organizations operating in the smart cities market.

The breakup of the profiles of the primary participants is given below:

By Company: Tier 1 – 35%, Tier 2 – 39%, and Tier 3 – 26%

By Designation: C-Level – 55% Directors – 40%, and Others – 5%

By Region: North America – 30%, Europe – 35%, APAC – 25%, and RoW – 10%

The key vendors profiled in the report are as follows:

Cisco Systems (US)

IBM (US)

Siemens AG (Germany)

Microsoft (US)

Hitachi (Japan)

Schneider Electric (France)

Huawei (China)

Intel (US)

NEC (Japan)

GE (US)

Fujitsu (Japan)

Oracle (US)

SAP SE (Germany)

Ericsson (Sweden)

ABB (Switzerland)

Honeywell (US)

Google(US)

AWS(US)

AT&T(US)

Nokia(Finland)

Vodafone (UK)

Itron(US)

Verizon (US)

Accenture(Ireland)

TCS (India)

Alibaba (China)

Research Coverage

The smart cities market has been segmented based on focus areas (smart transportation, smart buildings, smart utilities, and smart citizen services) and region. A detailed analysis of the key industry players has been undertaken to provide insights into their business overviews; services; key strategies; new service launches; partnerships, agreements, and collaborations; business expansions; and competitive landscape associated with the global smart cities market.

Reasons to Buy the Report

The report would help the market leaders/new entrants in the following ways:

It comprehensively segments the smart cities market and provides the closest approximations of the revenue numbers for the overall market and its subsegments across regions.

It would help stakeholders understand the pulse of the market and provide

information about the key market drivers, restraints, challenges, and opportunities.

It would help stakeholders understand their competitors better and gain more insights to enhance their positions in the market. The competitive landscape section includes the competitor ecosystem, new service developments, partnerships, and acquisitions.

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*Details on Business Overview, Solutions & Services, Key Insights, Recent Developments, SWOT Analysis, MnM View might not be captured in case of unlisted companies.

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About

Smart city is a concept aimed to provide a set of new generation public and safety and security services and infrastructure with the help of ICT. Smart cities are differentiated in terms of their governance, technological advances, economic benefits, and social and environmental standards. Globally, there are about 700 cities, each with population exceeding 500,000 and are growing with a faster rate than the average urban growth. With the migration of rural population towards urban places, existing urban infrastructures are being put under tremendous pressure to accommodate and facilitate the ever-increasing population. This factor opens up the market for industry players to grow their business in new and emerging smart cities. The infrastructure investment for these cities is forecast to be \$XX trillion to \$XX trillion, cumulatively, over the next XX years. The rising demographics and urbanization is thus considered as the major factor driving the global smart cities market.

With the growing emphasis on reducing carbon emissions and the fact that conventional cities form a major source of CO₂ emissions, planning a smart city becomes a viable option for governments and municipal authorities. Deploying technologies such as smart grids, smart metering for energy management; electric vehicle and traffic management with smart transportation and smart security are high growth areas within smart cities. Thus, smart transportation, smart security, and smart energy management are considered to be the most important components in smart cities. As citizens and governments are becoming more environment conscious, there is a push for tougher regulations such as Clean Air Act by the U.S. Environmental Protection Agency, aimed at reducing carbon footprint, thus, driving the market. Time and resources management benefits achieved through smarter technologies is another major advantage that smart cities have over traditional infrastructures.

Apart from the increasing adoption of smart technologies in smart cities, the associated services market shows an exponential growing trend. The services market comprises traditional services (maintenance, repair, replace, upgrades or operations outsourcing), advanced services (consulting and planning) and software services (business analytics, cloud computing and others). The Software adoption within smart cities indicates a visible trend of the power behind data integration that binds disparate systems. Big players such as IBM and Siemens have tapped this potential significantly to establish leadership in the smart cities market. Major communication and automation companies such as Ericsson, ABB, Hitachi, and Schneider and leading technology vendors such as Cisco have established a significant market presence through large-scale deployments

across smart cities.

The rapid growth in population and the growing employment opportunities in the urban areas have prompted major migration trends from the rural towards the urban regions. Thus, the need for transformation of urban infrastructure gets intensified to support the growing urbanization. This factor would serve as the main driver for the smart cities market in the near future. The growing environmental concerns across the globe and the need for smarter resources are also considered to be one the major drivers for the market. The project funding and the capital expenditures required for such large-scale deployment of technology is expected to hinder the growing smart cities market. The transformational downtime as well as the big data generated in the smart city operations would be serious concerns serving as significant restraints for the market. The great amount of critical generated brings in the risk of cyber threats wherein attackers, hackers, and terrorists could access critical data, inflicting major security concerns resulting in political and public chaos. The smart city solution providers face a major challenge to assure increased cyber security measures for the smart network which in turn raises the operating costs.

The report includes an in-depth study of the market trends, market sizing, competitive mapping, and market dynamics of the smart cities market. The industry trends, drivers, and opportunities in the smart cities market distinctly indicate a noteworthy growth in the next XX years. The smart cities market is segmented into smart home, intelligent building automation, energy management, smart transportation, citizen service, and smart security; by region into NA, Europe, APAC, MEA, and LA. The major companies in the global smart cities market are Cisco, Ericsson, Hitachi, IBM, Siemens, ABB, Alcatel-Lucent, General Electric, Honeywell, and Schneider Electric.

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