

Connecting Water Infrastructure: Telecom Company Strategies in the Global Digital Water Market



About this Insight Report

The Internet of Things is giving rise to a new group of influential companies in water: telecommunications firms. By providing the essential “rails” for data transmissions and connectivity, telecom players are well-positioned to leverage their unique positions at the center of the digitization of water. Telecom players are developing water-specific strategies because they see water as another potential pathway to capturing new sources of revenue.

As municipal water utilities become more sophisticated in their adoption of digital solutions, communications providers are being compelled to address a disparate landscape of digital needs. From smart meters and mobile devices to distribution pumps and chemical dosing systems, asset connectivity is also influenced by geography (e.g., rural vs. urban) and timing (e.g., real time vs. intermittent monitoring).

As a result, the competitive landscape is increasingly dynamic and shaping telecom firms’ strategic approaches to market. Companies are seeking to add value in new ways by going directly to customers with in-house hardware/software, implementation & integration services, and upselling existing municipal relationships.

Sample Insights

- Telecom firms face a highly saturated market leading players to target enterprise customers with new products and services, vertical-specific growth strategies.
- The commercial & industrial IoT market represents an attractive growth opportunity for incumbent and emerging telecom providers, with the global connected device count expected to scale at a 19.2% CAGR between 2018 and 2023.
- Global digital water project announcements increased 53.0% since 2016, despite a slowdown in project activity in 2020 due to the COVID-19 pandemic.
- Leading international telecom equipment and service providers such as AT&T, Verizon, Vodafone, BT, Huawei, Telstra, and Semtech have carved out distinct strategic positions in the digital water market.

report SCOPE

This Insight Report evaluates the changing digital water strategies of leading telecommunication players in North America, Europe, and Asia Pacific.

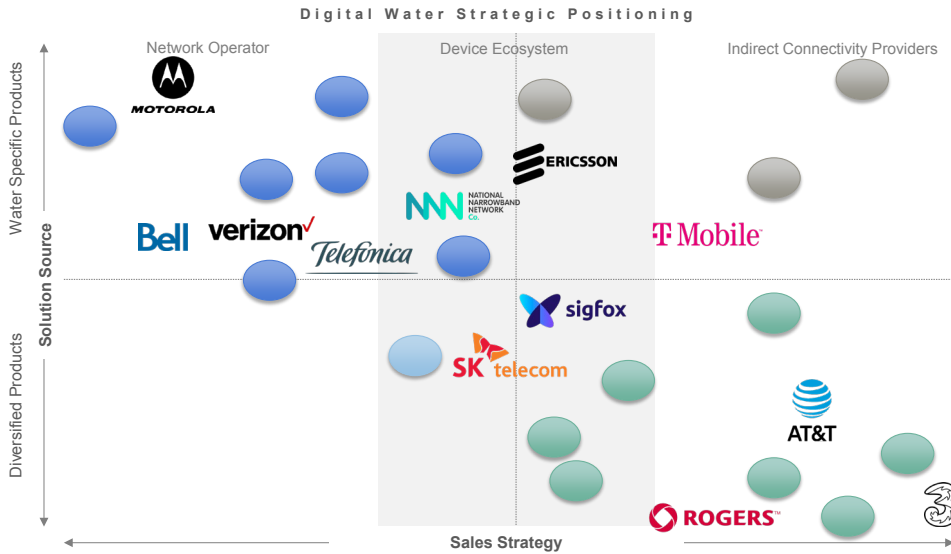
report FEATURES

- Trends and market development driving telecom firms’ interest in water
- Opportunities and challenges for telecom firms entering water
- Competitive analysis of telecom company landscape
- Profiles of top 30 telecom players. Profiles include:
 - Key Water Projects
 - Digital Water Strategic Positions
 - Water-Related Partnerships
 - Protocols Supported

WHO should buy this report?

- Digital water providers
- Telecom and communications companies considering water as an opportunity
- Utilities looking to partner

Exhibit: Telecom Players Stake Out Strategic Positions in Digital Water



Source: Bluefield Research

Incumbent telecom players and new market entrants are jockeying for positions across the value chain, leveraging various entry strategies in a bid to move beyond connectivity.

Key questions addressed in this report

- How will telecom and connectivity providers disrupt the water sector?
- What are the most successful strategies for market entry?
- What's driving telecom players' interest in water, and what are the challenges and opportunities?
- How does the competitive landscape vary by region?
- What will the impact be of 5G, LPWAN, and other market developments on telecom company strategies in water?
- Why does the global digital water market present an attractive investment opportunity for telecom firms?
- Which telecom companies are leading the way with successful strategies?

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Bluefield's reports contain tons of useful, detailed data and qualitative inputs into key trends. We rely on their insights for our business planning.

--Market Research Analyst
Leading Engineering Company

We find real value in Bluefield's responsiveness and transparency in answering questions about the supporting data and research methodology used in their water market insights.

--Research Specialist
Black & Veatch

Bluefield Research's *Digital Water* analysis has become the leading resource for independent, data-driven analysis of key markets, technologies, and companies addressing municipal and industrial water management.

Report Summary

Report Scope and Methodology

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Market Entry

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“Telecom companies such as Telstra (Australia), Vodafone (Europe), and Verizon (U.S.) are looking to water to scale their IoT footprints, investing in utility-facing solutions to build-out positions in the broader smart city value chain.”

Nina Rossiter
Digital Water Analyst
Bluefield Research

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