

FROST & SULLIVAN
BEST PRACTICES



2026

EMEA MDM ENABLED
GRID DATA SOLUTIONS

**TECHNOLOGY INNOVATION
LEADERSHIP**

Sagemcom

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Best Practices Criteria for World-Class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each recognition category before determining the final recognition recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. Sagemcom excels in many of the criteria in the meter data management and enabled grid data solutions space.

RECOGNITION CRITERIA	
<i>Business Impact</i>	<i>Technology Leverage</i>
Financial Performance	Commitment to Innovation
Customer Acquisition	Commitment to Creativity
Operational Efficiency	Stage Gate Efficiency
Growth Potential	Commercialization
Human Capital	Application Diversity

From Meter Reading to Grid Intelligence: The New Era of MDM-Enabled Grid Data Solutions

The meter data management (MDM) industry in Europe, the Middle East, and Africa (EMEA) is undergoing a transformational shift of unprecedented scale, driven by the convergence of digitalization, decarbonization, and decentralization. Once considered a back-office function for billing and compliance, MDM has evolved into the intelligence layer of the modern grid, enabling utilities to orchestrate data across millions of endpoints, optimize network performance, and deliver new value streams to customers.

This transformation is fueled by several key forces. The energy transition is accelerating, with distributed energy resources (DERs), electric vehicles (EVs), and prosumer models introducing complexity into grid operations. Utilities must now manage bi-directional energy flows and balance supply and demand in real time. Regulatory mandates such as GDPR and NIS2 in Europe impose stringent requirements for data privacy, cybersecurity, and interoperability, compelling utilities to adopt platforms that are both secure and standards-compliant. The rise of multi-utility integration, that is, combining electricity, gas, water, and heat, demands solutions that can consolidate diverse data streams into a unified, actionable framework.

The role of MDM has expanded beyond meter reading to encompass universal, near real time Meter Data Collection (MDC), advanced analytics, edge intelligence, and artificial intelligence (AI)-driven decision-making. Today’s platforms must process vast volumes of data, detect anomalies, predict maintenance needs, and enable demand response programs, all while ensuring compliance and scalability. In this

context, MDM is no longer a passive repository; it is a strategic enabler of the digital energy transition, empowering utilities to achieve operational excellence, regulatory compliance, and sustainability goals.

Reframing MDM: From System of Record to System of Intelligence

Sagemcom's innovation begins with a fundamental shift in how meter data management is conceptualized. Rather than treating MDM as a downstream billing system, the company positions it as an active orchestration layer at the center of utility operations.

This transformation enables near real-time processing of high-frequency data, supports event-driven architectures, and facilitates bidirectional data flows between grid systems. By embedding intelligence directly into the data pipeline, Sagemcom ensures that only relevant, contextualized information is transmitted and acted upon, reducing data overload while enhancing decision quality.

Utilities leveraging this approach benefit from improved operational visibility, faster response to network events, and enhanced ability to manage increasingly complex grid dynamics. The result is a system that not only manages data but actively enables grid decisions.

The Hybrid Intelligence Paradigm: Redefining Grid Architecture

A defining innovation in Sagemcom's approach is its hybrid intelligence paradigm, which distributes processing dynamically across smart meters, edge gateways, and centralized MDM platforms. This architecture adapts to performance requirements, regulatory constraints, and infrastructure maturity, enabling utilities to optimize where and how data is processed.

This approach is particularly relevant in Europe, where large-scale smart meter deployments are already in place. Rather than requiring costly infrastructure replacement, Sagemcom enables utilities to extend existing systems through gateway-based intelligence. This allows for the introduction of advanced functionalities such as load disaggregation, EV detection, and localized grid event processing without disrupting existing assets.

By aligning architectural flexibility with real-world constraints, Sagemcom delivers innovation that is both technically advanced and economically viable.

Sagemcom's platform is engineered for long-term evolution within utility deployment lifecycles that typically span 15 to 20 years or more. Its modular architecture enables continuous integration of new technologies, including near real-time business use cases, through a powerful MDC engine, advanced analytics and AI, when needed by utilities without requiring system replacement.

This ensures that utilities can modernize incrementally while maintaining operational continuity, protecting prior investments, and adapting to evolving regulatory and technological requirements.

“Sagemcom is actively enabling the transition toward AMI 2.0 and beyond, supporting emerging use cases such as flexibility markets, DER integration, dynamic pricing, and AI-driven grid intelligence. Its platform integrates with DERMS and other grid systems while supporting dual data environments for operational and analytical use. This ensures that utilities are future-ready, capable of adopting new technologies and business models without requiring fundamental system redesign.”

**- Neha Tatikota,
Senior Industry Analyst**

Communication-Centric DNA: Engineering for Scale and Performance

Sagemcom’s telecommunications heritage underpins its approach to grid data management, embedding communication efficiency directly into its architecture. This enables optimized data transmission, reduced network congestion, and reliable performance across large-scale deployments.

As utilities move toward higher data frequency and real-time grid monitoring, the ability to manage both data volume and velocity becomes critical. Sagemcom’s communication-centric design ensures that data flows are efficient, scalable, and

resilient, supporting deployments ranging from hundreds of thousands to several million endpoints.

This capability positions Sagemcom as a foundational enabler of future grid architectures, where performance and scalability are essential.

Anticipating Tomorrow: Sagemcom’s Strategic Roadmap for AMI 2.0

Sagemcom stands at the forefront of this transformation with its SICONIA™ MDM platform, a solution that embodies the company’s visionary approach to innovation and performance. SICONIA™ MDM transforms raw meter data into actionable intelligence, enabling utilities to optimize grid performance and deliver new value streams. Designed to address the evolving needs of utilities, SICONIA™ offers a modular, interoperable, and future-ready architecture that supports electricity as the core utility while extending seamlessly to gas, water, and heat. This multi-utility capability positions Sagemcom as a trusted partner for integrated utilities and smart city projects across EMEA.

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Sagemcom’s ability to scale innovation into real-world impact is evident in its track record of large-scale deployments. The company plays a pivotal role in the Fluvius program with Fluvius in Belgium, one of the largest smart metering initiatives in Europe, managing more than 7 million multi-utility smart meters. This implementation enables Fluvius to orchestrate near real-time data flows, ensure GDPR compliance, and enhance outage management capabilities. This resulted in optimized grid operations, improved customer engagement, and measurable cost efficiencies.

“Sagemcom embeds regulatory compliance directly into its architecture, aligning with European requirements for data privacy, cybersecurity, and interoperability. By integrating compliance into system design, the company reduces adoption risk for utilities and accelerates deployment timelines. This approach transforms regulatory complexity into a competitive strength, reinforcing trust with utilities and enabling smoother implementation of advanced grid solutions.”

**- Neha Tatikota,
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Similar success story unfolds with Netz Nö (EVN Group – Austria), where Sagemcom’s SICONIA™ platform integrates multi-vendor Smart Meter supplier into a unified framework. This interoperability reduces integration costs, accelerates time-to-market for new services, and positions Utilities to lead in demand response and energy efficiency programs. These achievements underscore Sagemcom’s ability to future-proof utility investments while delivering tangible operational and customer benefits.

In the Europe Middel-East and Africa, Sagemcom’s deployment of a scalable MDM

solution for a leading distribution system operator (DSO) demonstrates its adaptability to high-demand environments. The platform’s edge-to-cloud intelligence and AI-driven analytics empower the utility to detect anomalies, predict maintenance needs, and optimize load management. These capabilities translate into greater grid resilience, reduced operational costs, and improved service reliability.

SICONIA™: The Digital Brain of the Smart Grid

At the heart of Sagemcom’s differentiation is its ability to leverage advanced technologies to deliver superior performance and value. The SICONIA™ platform is built on an edge-to-cloud architecture that enables real-time data processing and analytics, ensuring that utilities can make informed decisions quickly and efficiently. This architecture supports a wide range of functionalities, from load forecasting and outage management to fraud detection and predictive maintenance, all powered by AI and machine learning algorithms and involutivity through and applications that can be added in the meters or gateways alongside the lifetime of the product (Distributed Intelligence).

Event-driven architecture and data pre-aggregation at the meter or gateway level further reduce processing burden, lower infrastructure costs, and improve system efficiency. This ensures utilities can manage increasing data volumes without compromising performance.

Cybersecurity leadership is another defining strength. In an era where cyber threats pose significant risks to grid stability and customer trust, Sagemcom sets the benchmark with a platform fully compliant with GDPR and NIS2 directives. Advanced encryption, secure firmware updates, and robust access controls are integral to the SICONIA™ design, providing utilities with the confidence to manage sensitive data in a secure environment.

Interoperability is a cornerstone of Sagemcom’s technology strategy. By adhering to international standards such as CIM (IEC 61968/61970)/Multispeak and DLMS/COSEM, the SICONIA™ platform ensures seamless integration with multi-vendor AMI systems and enterprise applications. This capability not only reduces integration costs but also provides utilities with the flexibility to adapt to evolving market conditions without being locked into proprietary ecosystems. In a market where future-proofing investments is critical, Sagemcom’s commitment to open standards is a key differentiator. Sagemcom

embeds regulatory compliance directly into its architecture, aligning with European requirements for data privacy, cybersecurity, and interoperability. By integrating compliance into system design, the company reduces adoption risk for utilities and accelerates deployment timelines. This approach transforms regulatory complexity into a competitive strength, reinforcing trust with utilities and enabling smoother implementation of advanced grid solutions.

Turning Data into Decisions: Real-World Impact for Utilities

Sagemcom's customer-centric approach is evident in the tangible benefits delivered through its MDM solutions. Utilities leveraging the SICONIA™ platform report significant improvements in operational efficiency, driven by automation, remote monitoring, and optimized data flows. These efficiencies translate into measurable cost savings, reduced outage durations, and enhanced grid reliability.

In Hungary, Sagemcom enabled a leading DSO to pilot its SICONIA™ MDM platform as part of a smart grid modernization initiative. The solution supported real-time data acquisition and analytics across high-density regions, enabling the detection of anomalies and non-technical losses in near real time. Advanced functionalities, such as transformer load monitoring, outage detection, EV detection, and solar integration, were introduced, allowing the utility to transition from reactive to predictive grid management. These capabilities improved grid reliability, reduced operational losses, and enhanced planning accuracy for network expansion.¹

Sagemcom has also demonstrated its integration expertise in Luxembourg, where it contributed to a multi-utility pilot in collaboration with Atos, and in Lithuania, where it supported MDMS integration with Siemens EnergyIP. Groupe E in Switzerland selected Sagemcom's SICONIA™ Software Suite to manage its smart meter deployment, aiming to enhance grid management and operational efficiency. This implementation underscores Sagemcom's ability to deliver modular, interoperable solutions that integrate metering, data management, and communication layers within a unified platform.² These projects underscore Sagemcom's ability to deliver interoperable, standards-compliant solutions that align with European regulatory requirements.

The value proposition extends beyond operational and customer benefits to include regulatory compliance and future readiness. With built-in support for emerging standards and technologies, the SICONIA™ platform ensures that utilities can navigate the complexities of the energy transition with confidence. This combination of performance, flexibility, and foresight positions Sagemcom as a partner of choice for utilities across EMEA.

Sagemcom supports a broad spectrum of applications across grid operations, customer engagement, and energy transition use cases, including Fault detection and outage management, transformer load monitoring, non-technical loss detection, EV detection and solar integration, and predictive maintenance and asset optimization.

¹ "Case Study: Creating an efficient energy network," Zenitch, 2024, [Sagemcom-case-study-2026.pdf](#).

² "Sagemcom Siconia™ software suite selected by Groupe e for its smart meter deployment in Switzerland," Sagemcom, April 14, 2022, <https://www.sagemcom.com/en/cp-sagemcom-siconiatm-software-suite-selected-groupe-e-its-smart-meter-deployment-switzerland-0>.

By enabling real-time visibility and advanced analytics, Sagemcom empowers utilities to transition from reactive to predictive and prescriptive operations. This enhances grid reliability, improves asset utilization, and supports the integration of distributed energy resources.

Innovation with Purpose: Driving a Greener, Smarter Future

Sagemcom's commitment to sustainability is deeply embedded in its corporate DNA. As a mission-driven company, Sagemcom has set ambitious targets to reduce its environmental footprint and promote social responsibility. Key initiatives include ambitious decarbonisation targets validated by the SBTi (net zero scope 1, 2 and 3 by 2040), the adoption of 100% renewable energy across all sites, and the integration of eco-design principles into product development.³ Sagemcom's mission-driven approach ensures that innovation and environmental responsibility go hand in hand, shaping the future of energy management.

The company has also introduced an environmental passport for all products, providing a transparent view of their environmental impacts in compliance with the future European regulation on Digital Product Passports. This initiative reflects Sagemcom's commitment to the circular economy, promoting resource efficiency and reducing waste throughout the product lifecycle.

Beyond environmental sustainability, Sagemcom prioritizes social responsibility, with programs focused on diversity, inclusion, and employee well-being. Initiatives such as non-discriminatory recruitment training, career development programs, and health and safety measures underscore the company's holistic approach to corporate responsibility. By aligning innovation with sustainability, Sagemcom not only meets the expectations of regulators and customers but also contributes to the broader goal of a sustainable energy future.

Conclusion

Sagemcom exemplifies technology innovation leadership in the EMEA MDM market through its visionary strategy, advanced technology, and unwavering commitment to sustainability. The SICONIA™ platform sets a new standard for interoperability, scalability, and intelligence, enabling utilities to navigate the complexities of the energy transition with confidence. By combining cutting-edge solutions with a mission-driven ethos, Sagemcom delivers exceptional value to customers, stakeholders, and society at large.

With its strong overall performance, Sagemcom earns Frost & Sullivan's 2026 EMEA Technology Innovation Leadership Recognition in the MDM-enabled grid data solutions industry.

³ "Mission Report 2024," Sagemcom, https://www.sagemcom.com/sites/default/files/2024-12/Mission_report_2023_EN.pdf.

What You Need to Know about the Technology Innovation Leadership Recognition

Frost & Sullivan's Technology Innovation Recognition identifies the company that has introduced the best underlying technology for achieving remarkable product and customer success while driving future business value.

Best Practices Recognition Analysis

For the Technology Innovation Leadership Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

Technology Leverage

Commitment to Innovation: Continuous emerging technology adoption and creation enables new product development and enhances product performance

Commitment to Creativity: Company leverages technology advancements to push the limits of form and function in the pursuit of white space innovation

Stage Gate Efficiency: Technology adoption enhances the stage gate process for launching new products and solutions

Commercialization: Company displays a proven track record of taking new technologies to market with a high success rate

Application Diversity: Company develops and/or integrates technology that serves multiple applications and multiple environments

Business Impact

Financial Performance: Strong overall business performance is achieved in terms of revenue, revenue growth, operating margin, and other key financial metrics

Customer Acquisition: Customer-facing processes support efficient and consistent new customer acquisition while enhancing customer retention

Operational Efficiency: Company staff performs assigned tasks productively, quickly, and to a high-quality standard

Growth Potential: Growth is fostered by a strong customer focus that strengthens the brand and reinforces customer loyalty

Human Capital: Leveraging innovative technology characterizes the company culture, which enhances employee morale and retention

Best Practices Recognition Analytics Methodology

Inspire the World to Support True Leaders

This long-term process spans 12 months, beginning with the prioritization of the sector. It involves a rigorous approach that includes comprehensive scanning and analytics to identify key best practice trends. A dedicated team of analysts, advisors, coaches, and experts collaborates closely, ensuring thorough review and input. The goal is to maximize the company's long-term value by leveraging unique perspectives to support each Best Practice Recognition and identify meaningful transformation and impact.

VALUE IMPACT			
STEP		WHAT	WHY
1	Opportunity Universe	Identify Sectors with the Greatest Impact on the Global Economy	Value to Economic Development
2	Transformational Model	Analyze Strategic Imperatives That Drive Transformation	Understand and Create a Winning Strategy
3	Ecosystem	Map Critical Value Chains	Comprehensive Community that Shapes the Sector
4	Growth Generator	Data Foundation That Provides Decision Support System	Spark Opportunities and Accelerate Decision-making
5	Growth Opportunities	Identify Opportunities Generated by Companies	Drive the Transformation of the Industry
6	Frost Radar	Benchmark Companies on Future Growth Potential	Identify Most Powerful Companies to Action
7	Best Practices	Identify Companies Achieving Best Practices in All Critical Perspectives	Inspire the World
8	Companies to Action	Tell Your Story to the World (BICEP*)	Ecosystem Community Supporting Future Success

*Board of Directors, Investors, Customers, Employees, Partners

About Frost & Sullivan

Frost & Sullivan is the Growth Pipeline Company™. We power our clients to a future shaped by growth. Our Growth Pipeline as a Service™ provides the CEO and the CEO's growth team with a continuous and rigorous platform of growth opportunities, ensuring long-term success. To achieve positive outcomes, our team leverages over 60 years of experience, coaching organizations of all types and sizes across 6 continents with our proven best practices. To power your Growth Pipeline future, visit Frost & Sullivan at <http://www.frost.com>.

The Growth Pipeline Generator™

Frost & Sullivan's proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fueled by the Innovation Generator™.

[Learn more.](#)

Key Impacts:

- **Growth Pipeline:** Continuous Flow of Growth Opportunities
- **Growth Strategies:** Proven Best Practices
- **Innovation Culture:** Optimized Customer Experience
- **ROI & Margin:** Implementation Excellence
- **Transformational Growth:** Industry Leadership



The Innovation Generator™

Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

Analytical Perspectives:

- Megatrend (MT)
- Business Model (BM)
- Technology (TE)
- Industries (IN)
- Customer (CU)
- Geographies (GE)

