

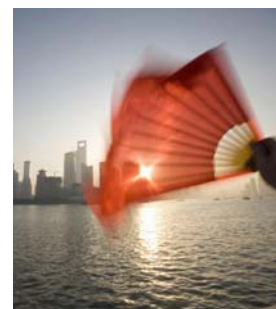
The World Market for Smart Electricity Meters - 2012 Edition

This document outlines the research scope for the 2012 update of the global smart electricity meter market. *The World Market for Smart Electricity Meters - 2012* is a continuing part of IMS Research's comprehensive metering portfolio, which also includes dedicated studies on water, gas and heat metering. Market segmentations to be included are meter measurement type, advanced read topology, application, product type and country level analysis, which includes a detailed installed base analysis. Market shares will be presented on a major region level for total sales of electricity meters, communication modules, various product groupings and for integrated advanced metering.

IMS research has provided detailed, numbers-based market intelligence on the metering market for over 15 years, including dedicated studies on electricity, gas, water and heat metering, as well as internal customer-side monitoring for fluids and electricity. Recent portfolio additions now provide coverage of distribution automation, energy management equipment, and smart grid communications.

Key Questions to be Answered

- **What is the current market size and future project growth of the global smart meter market? How does this vary by region?**
- **What communication type will be forecast to hold dominant share by 2017? Cellular? RF Mesh? PLC?**
- **What countries are poised to have significant market development for smart meters in the short term? 2012 and 2013?**
- **What is the smart meter rollout status in China? Japan? Brazil? India? Other potentially large smart meter markets?**
- **What is the installed base of electricity meters (and smart meters) by country, region, and globally?**
- **Who are the top suppliers of C&I meters? Smart meters? By region? Globally?**



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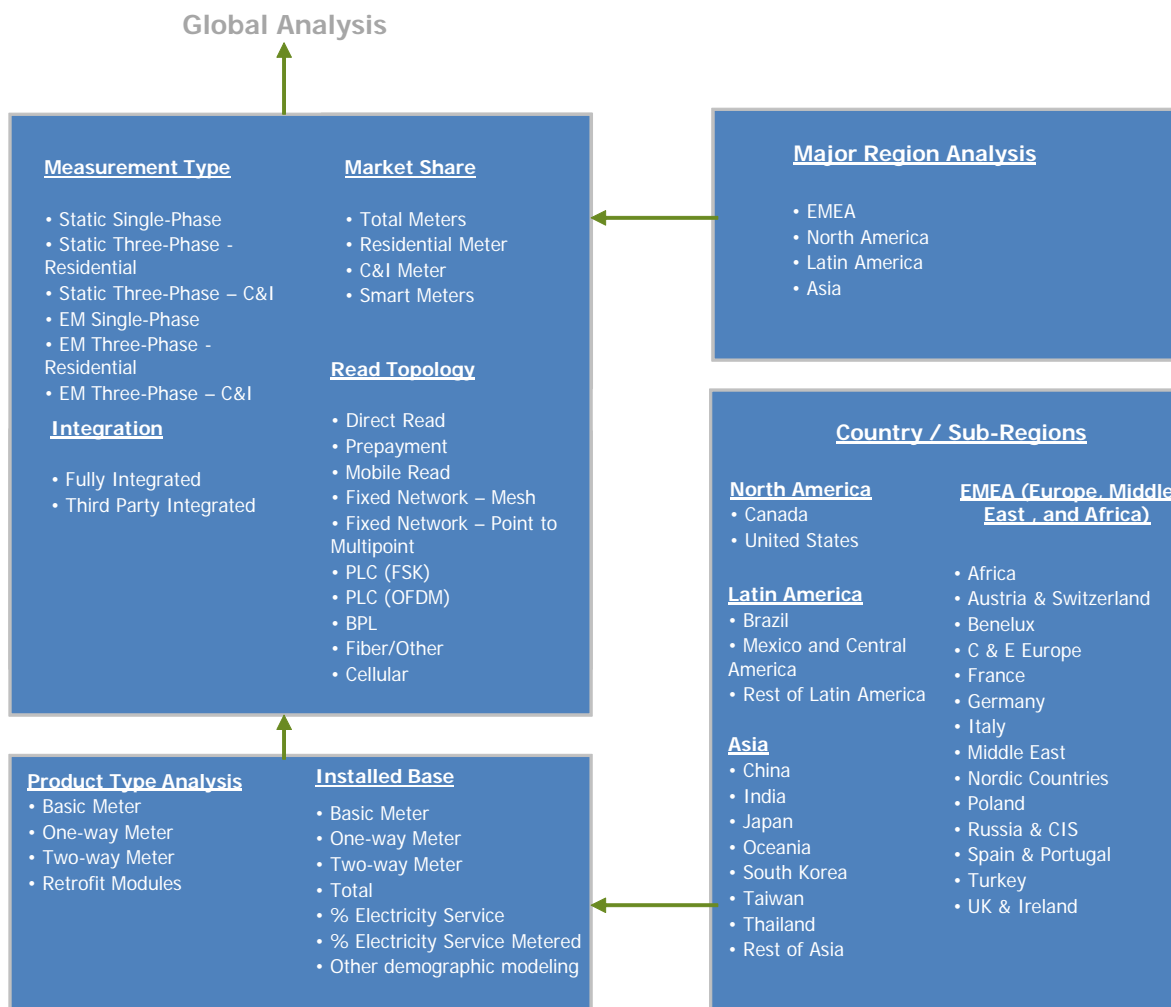
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Report Content

The following graphic shows the market segmentations presented in this report. Subsequent pages show sample tables of how the data is to be presented. All market data in this study will be presented in unit shipments, dollar revenues, and average unit prices. Country-level analysis will be done in unit shipments only. Suppliers worldwide will be approached to submit their respective 2011 sales data. Market shares will be done in unit shipments for the whole of the base year of 2011. Market forecasts will be done from 2012 to 2017, incorporating supplier interviews, order books, and updated demographic modeling.

The report will be organized by major region, with a global chapter followed by four major region chapters for EMEA, North America, Latin America and Asia. Within each major region will be the country models, where all forecasting is reviewed.



Report Content (Continued)

Country Model Analysis

All forecasting will take place at the country or sub-region level. Here, product types for meters and modules, as well as installed base, will be forecast. Demographic modeling is provided to assist in understanding installed meter counts, utility connection rates, and metering connection rates. A list of how countries and sub-regions will be segmented out is on page 2 of this proposal.

Sample Table 1.0 The Japan Country Profile for Electricity Meters Growth Model & Product Analysis in Unit Shipments (k)								
	2010	2011	2012	2013	2014	2015	2016	CAGR 10 - 16
Growth Model								
Existing Buildings (k)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0%
New Buildings (k)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0%
Electrification Rate (%)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
Electricity Supply Connected to Meters (%)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
Average Meter Replacement Period (Years)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Percentage of Metering Stock Replaced (%)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
Meters Shipped for Replacement (k)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0%
Meters Shipped for New Buildings (k)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0%
Basic Meter Installed Base (k)	0	0	0	0	0	0	0	
One-way Installed Base (k)	0	0	0	0	0	0	0	
Two-way Installed Base (k)	0	0	0	0	0	0	0	
Total Installed Base at End of Year (k)	0	0	0	0	0	0	0	
Residential Product Analysis								
Basic Meter	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0%
One-way Meter	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0%
Two-way Meter	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0%
C&I Product Type Analysis								
Basic Meter	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0%
One-way Meter	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0%
Two-way Meter	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0%
Retrofit								
Retrofit Communication Modules	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0%
Measurement Type								
Static	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0%
Mechanical (Ferraris)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0%
Total Units (k)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0%
Annual Growth		0%	0%	0%	0%	0%	0%	
Total Advanced Meter Shipments (k)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0%
Annual Growth		0%	0%	0%	0%	0%	0%	
% of Shipments - Advanced Meters	0%	0%	0%	0%	0%	0%	0%	
Source: IMS Research								Oct-12

Report Content (Continued)

Sample Table 2.0
The Asian Market for Electricity Meters by Meter Read Topology
Unit Shipments (k) & Revenues (\$M)

Read Topology		2010	2011	2012	2013	2014	2015	2016	CAGR 10 - 16
Direct Read	Revenues (\$M)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0%
	Units (k)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
	ASP (\$)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Prepay	Revenues (\$M)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0%
	Units (k)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
	ASP (\$)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Mobile Read	Revenues (\$M)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0%
	Units (k)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
	ASP (\$)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Fixed Network - Mesh	Revenues (\$M)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0%
	Units (k)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
	ASP (\$)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
PLC (FSK)	Revenues (\$M)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0%
	Units (k)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
	ASP (\$)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
PLC (OFDM)	Revenues (\$M)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0%
	Units (k)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
	ASP (\$)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
BPL	Revenues (\$M)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0%
	Units (k)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
	ASP (\$)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Fiber/Other	Revenues (\$M)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0%
	Units (k)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
	ASP (\$)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Fixed Network - Point to Multipoint	Revenues (\$M)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0%
	Units (k)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
	ASP (\$)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Cellular	Revenues (\$M)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0%
	Units (k)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
	ASP (\$)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Total	Revenues (\$M)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0%
	Annual Growth		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	Units (k)	0.0	0.0	0.0	0	0.0	0.0	0.0	
	Annual Growth		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	

Source: IMS Research Oct-12

COMPETITIVE ENVIRONMENT

The report will present market shares in unit shipments, for the whole of 2011. With numerous product segmentations, product groupings, and regions, the report will have upwards of 30 market share tables, helping to understand regional and product specific market supplier standing.

Sample Table 3.0
Market Share Estimates for Electricity Meters
EMEA - 2011 - Unit Shipments (k)

Company Name	2011 Share
1. Company Name	20.0%
2. Company Name	10.0%
3. Company Name	5.0%
4. Company Name	5.0%
5. Company Name	5.0%
6. Company Name	5.0%
7. Company Name	5.0%
8. Company Name	5.0%
9. Company Name	5.0%
10. Company Name	5.0%
Others	30.0%

The market in 2011 was estimated to be xx.x thousand units.

Source: IMS Research Oct-12

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Report Process	Timescale
Key Issue Definition & Pre-Purchaser Enrollment	May 2012 to September 2012
Agree Specification With Pre-Purchasers	May - June 2012
Deliver Supplier Questionnaires	June 2012
Collect Questionnaires	July 2012
Conduct Interviews & Perform Secondary Research	May - September 2012
Develop Report	October 2012
Publish Report	November 2012

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IMS Research provides dedicated studies on electricity, water, gas and heat metering, as well as internal customer side monitoring for fluids and electricity. The Metering & Energy Management Group is at the forefront of IMS Research's smart grid market research effort to complete a robust portfolio which helps electronics manufacturers understand and exploit the emerging smart grid ecosystem.

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