



The Americas Market for Smart Grid Networking - 2012 Edition

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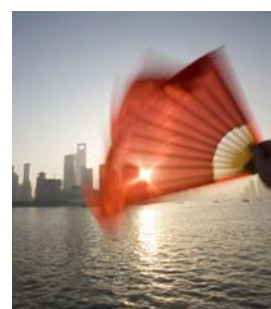
A new report from IMS Research evaluating the trends, opportunities, and challenges in networking supporting the smart grid.

Key Questions Answered

- What are the North and Latin American market sizes in revenues and unit shipments for networking hardware supporting grid automation and smart metering?
- Where is IEC 61850 adoption most advanced now, and what will drive its further penetration in the future?
- What are the major technology trends within smart grid networking hardware preference, cost, functionality and life cycle?
- When will smart metering and distribution automation convergence take place in the Americas, what utility needs will drive it, and what will hold this trend back?
- What is the competitive environment for smart grid networking equipment like today, and how is it changing to suit the shifting technological and business needs of utilities?
- How are utilities managing their legacy intelligent electronic devices while reaching to adopt new protocols and topologies in their total grid automation solutions?

Why IMS Research?

- Rigorous primary research process, with more than 50 interviews
- Semi-custom research method to ensure targeted, actionable insight
- Results built on years of grid automation and smart metering market analysis
- Access to analysts, offering expert opinion when you need it
- On-going support of market ensures relevant, up-to-the-minute market intelligence



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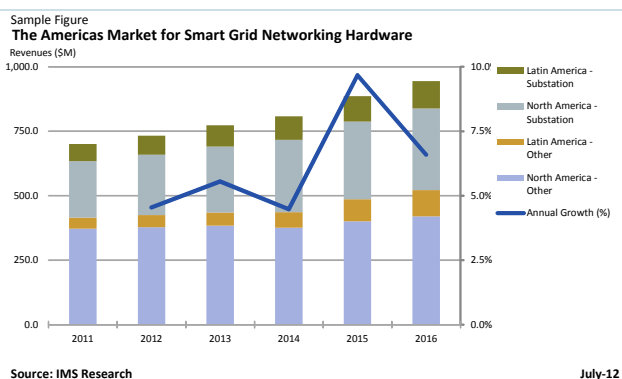
- Twenty networking hardware product markets analysed by five major regions.
- Connectivity analyses across eleven distribution automation equipment types.
- Thorough review of drivers and inhibitors of growth in the smart grid networking market, derived from institutional knowledge of the grid automation and smart metering markets.
- Diverse regional trends in substation automation and smart metering progress are discussed separately, building a well-founded total Americas market outlook.
- Trends in protocol adoption, integration of cellular radio services, security and privacy management, and technological preference within utilities are offered and contextualized.
- Market share estimates are provided for the leading suppliers of networking hardware by region and application.
- The report is highly quantitative, containing more than 50 market tables, market shares and figures.

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 See Page 4 for full details.

Sample Table
The Americas New Ethernet Connected Devices - Protocol
 (Thousands of New Ethernet Connected Devices)

	2011	2012	2013	2014	2015	2016	CAGR 11 - 16
DNP3 LAN	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%	
Modbus TCP/IP	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%	
IEC 61850	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%	
Others	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%	
New Ethernet-Connected Devices	0.0	0.0	0.0	0.0	0.0	0.0	0.0%
Total Annual Growth		0.0%	0.0%	0.0%	0.0%	0.0%	

Please Note: Not Real Data July-12



Report Introduction

As of the summer of 2012, smart grid activity in the Americas is changing focus. Smart meter rollouts are slowing in North America, while they are staged to begin soon in Latin America. Substation and distribution feeder automation are moving beyond legacy single-purpose systems and becoming integrated into sophisticated smart grid applications. Utility operators are evaluating their installed smart meter bases and the streams of data yielded by these points for additional use within the smart grid. All of this is taking place as utility companies in the Americas are facing the twin challenges of increasingly severe weather and aging infrastructure. The key to overcoming utility challenges in the coming years will be increased situational awareness and responsiveness through greater networking.

The report evaluates the present and future opportunity for suppliers of networking and communications hardware supporting automation of the smart grid in the Americas, as well as market shares of key suppliers. Building on IMS Research's experience in the distribution automation and smart meter markets, this market study investigates Ethernet and serial connectivity trends for intelligent electronic devices, security concerns of utilities, and the status of IEC 61850 adoption in the substations and feeders.

Market Breakdown

Substation Networking Hardware

- Timing Device
- Multiservice MUX
- Converter or Relay
- Serial Device Server
- Hub
- Unmanaged Switch
- Managed Switch
- Router
- Converged Platform
- Wireless Router/Bridge
- Retrofit Card/Module

Feeder/Other Networking Hardware

- AMI Concentrator
- AMI Concentrator w/ DA Functionality
- DA Link/Bridge
- Wireless Relay
- Base Station
- Wired Backhaul
- Other Transceiver
- PLC Equipment
- Satellite Equipment

Connectivity by Distribution Automation Device

- Smart Reclosers
- Switch Control Modules
- Digital Protective Relays
- Substation PCs
- RTUs
- Power Meters/Line Monitors
- Feeder Automation Hub Devices
- Communicating Fault Detectors
- Capacitor Controls
- Voltage Regulator Controls
- Other IEDs

Connectivity - Physical

- Copper
- Fiber
- Wireless

Ethernet Protocol

- DNP 3 LAN
- Modbus TCP/IP
- IEC 61850
- Others

By Geographic Region

- United States
- Canada
- Brazil
- Mexico
- Rest of Latin America



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