

***WORLDWIDE MARKET SURVEY
OF
SCADA, ENERGY MANAGEMENT SYSTEMS
AND
DISTRIBUTION MANAGEMENT SYSTEMS
IN
ELECTRICAL UTILITIES: 2005-2007***

***VOLUME I
FINAL REPORT***

NORTH AMERICAN MARKET

June 2005

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SECTION 1

INTRODUCTION

WORLDWIDE MARKET SURVEY OF SCADA, ENERGY MANAGEMENT SYSTEMS AND DISTRIBUTION MANAGEMENT SYSTEMS IN ELECTRICAL UTILITIES

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This North American market report has been prepared based on an update to Newton-Evans Research Company's 2003- 2005 report entitled *World Market Survey of SCADA and Energy Management Systems in Electrical Utilities: 2003-2005*.

A total of 191 North American electrical utilities are represented in this final study. This number included the following: 37 U.S. investor-owned utilities, 46 municipal utilities, 12 other public power agencies, 71 U.S. rural electric cooperatives, 15 Canadian utilities, and 10 anonymous responses.

The 191 North American electric utilities, the level of respondent title, and the level of knowledge exhibited about energy management systems (EMS), supervisory control and data acquisition (SCADA) systems, and distribution management systems (DMS), in the electrical utility environment, have resulted in a thorough and comprehensive report, as has been the standard of quality in dozens of utility-related market studies published by Newton-Evans Research Company since 1978.

Due to information privacy and security concerns, participating utilities will no longer be profiled in a separate volume of this series of reports.

This report, Volume 1 of four planned volumes, is structured around the questions asked of the utility participants. That is to say, the report covers Question 1 with narrative summaries, tables and figures as appropriate, then proceeds to Question 2, and so on.

Tables are arranged in a series format. All "n-1" tables are summaries to each question obtained from all utilities, regardless of type.

The "n-2" series is based on type of utility. The following five groupings are included in this tables series: U.S. investor-owned; U.S. municipal utilities; U.S. rural electric cooperatives; other U.S. public power (federal/state utilities); and, Canadian utilities.

The "n-3" series is based on number of customers served. The following seven groupings are included in this table series (customer number was not available for 12 utilities):

customers	respondents
> one million	16
250,000 - 1,000,000	29
100,000 - 249,999	25
25,000 - 99,999	42
10,000 - 24,999	30
<10,000	22
G&T/Power Authorities	15

Listing of comments and other write-in answers are provided in n-1A tables.

SECTION 2

FOREWORD

WORLDWIDE MARKET SURVEY OF SCADA, ENERGY MANAGEMENT SYSTEMS AND DISTRIBUTION MANAGEMENT SYSTEMS IN ELECTRICAL UTILITIES

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A) Sample Selection

The sample selected for this survey volume was originally developed using Newton-Evans Research Company's own database of utility officials, and supplemented with the Electrical World Directory of Electric Utilities. The sample included the largest investor-owned, municipal electrical utilities, rural electric cooperatives, and state and federal utility operations in the U.S., as well as the largest Canadian investor owned, provincial hydros, and municipals.

Utilities were contacted either by phone or e-mail, and followed up by e-mail.

B) Survey Respondents

Almost all of the questionnaires returned to Newton-Evans Research Company in time to be tabulated for this report included the name, title, phone number, and mailing address of the survey respondent. The surveys were answered by senior officials in either the operations or engineering departments.

C) Questionnaire

The survey questionnaire format and layout are similar to dozens of others used by Newton-Evans Research Company over the past 27 years. Series subscribers to prior editions were given the opportunity to submit questions for possible inclusion in the final survey format.

Eighteen question groups (accounting for over 30 questions) were included on the survey questionnaire.

D) Survey Respondent Incentive

As an incentive for utilities to respond to the survey questionnaire, Newton-Evans Research Company provided a complimentary copy of the Executive Summary of this volume's final report. Approximately 90 percent of the participants requested and received a copy of this summary. Small honorariums were also provided.

E) Accompanying Report Commentary

Along with the narrative analysis and cross-tabulation of survey data, Newton-Evans Research Company has commented on observations and findings or has provided its own interpretations of findings based on many years of related utility industry research projects and programs.

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