

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

***VOLUME II
FINAL REPORT***

INTERNATIONAL MARKET

September 2005

**Newton-Evans Research Company
Ellicott City, MD 21042**

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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 international market report has been prepared based on an update to Newton-Evans Research Company's 2003-2005 research series and earlier 2001- 2003 series entitled *World Market Survey of SCADA and Energy Management Systems in Electrical Utilities..*

This report, Volume 2 in the 2005 series of EMS, SCADA and DMS market studies, contains information from a survey of more than 50 international utilities.

Major and mid-size utilities in nearly 40 countries assisted Newton-Evans staff through their active participation in this study. More than 100 different control center based systems were identified as being currently installed among these utilities.

A total of 29 suppliers were represented with one or more types of control systems. More than 50 planned replacements, additions or major upgrades were identified from among this group.

Summary:

The participation of more than 50 international electric utilities, the level of respondent title, and the level of knowledge exhibited about energy management systems (EMS) and 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.

The participating utilities can no longer be summarily profiled in a separate volume of this series of reports due to security and confidentiality concerns.

This report 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 the world region of the responding utility. The following three groupings are included in this table series: Europe; Asia-Pacific and rest-of-world.

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 ABS Energy Research publication entitled: Electrical Utilities of the World: 2004 Edition. The Newton-Evans research sample included the major utilities in more than 150 countries from throughout the world.

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

B) Survey Respondents

All of the questionnaires returned to Newton-Evans Research Company in time to be tabulated for this report included the current recontact information required for the survey respondent. The surveys were answered by senior utility officials in either the operations or engineering departments. Small honorariums and summary reports were provided as incentives for survey participation.

C) Questionnaire

The survey questionnaire format and layout are similar to dozens of others used by Newton-Evans Research Company over the past 25 years. Series subscribers to prior editions were given the opportunity to submit questions for possible inclusion in the final survey format.

Seventeen question groups (accounting for over 25 questions) were included on the survey questionnaire.

Questions 6 through 10 are new in this year's study.

D) Survey Respondent Cooperative 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. Nearly all participants requested and received a copy of this summary. Small honorariums were also provided in most cases in appreciation of the time and effort to complete the survey. Over the years, charity donations in the name of Newton-Evans survey respondents made to UNICEF, Red Cross/Red Crescent and other groups have amounted to several thousands of dollars.

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 more than a quarter century of related electric power T&D industry research projects and programs.

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