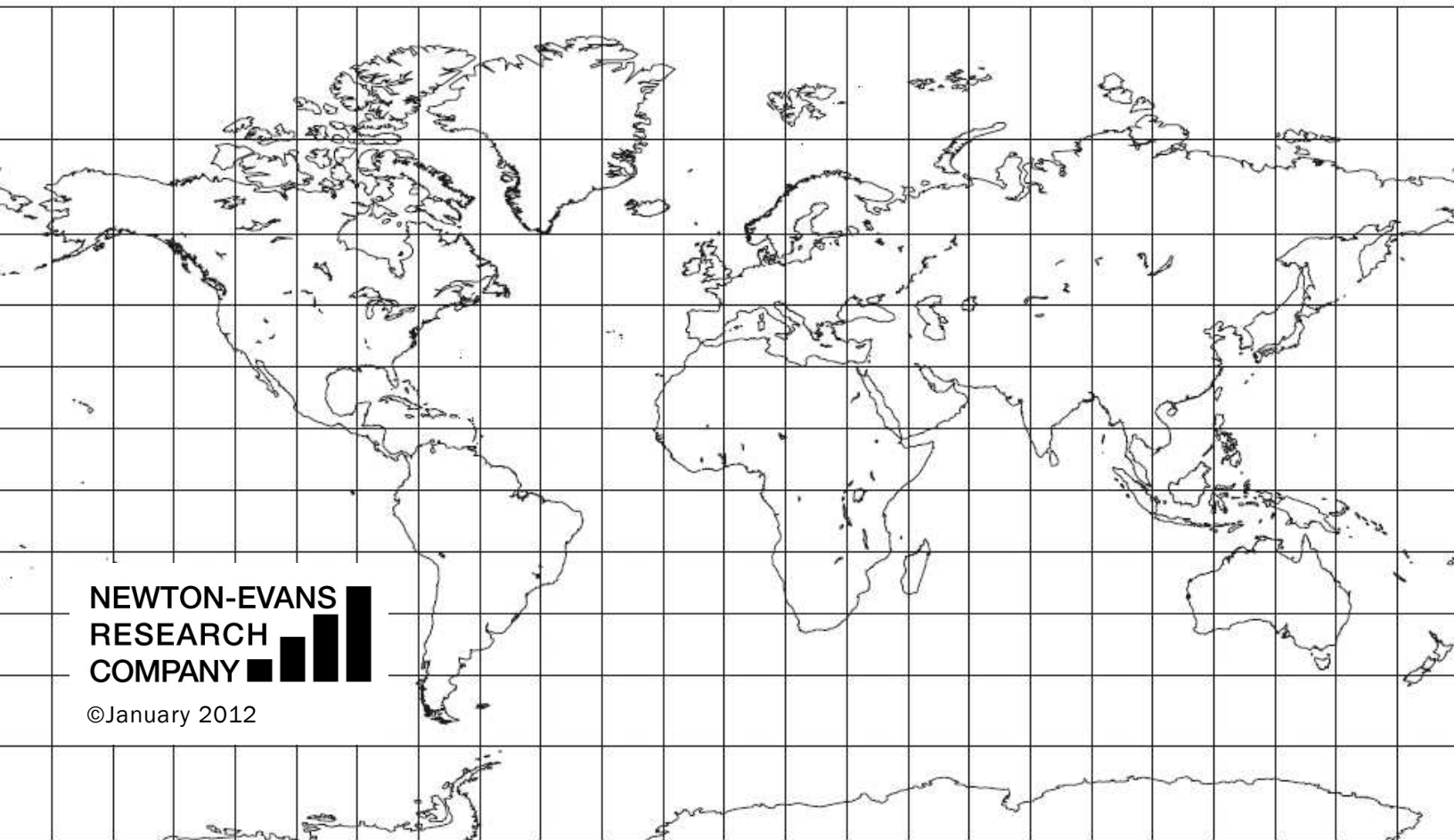


Worldwide Study of the Protective Relay Marketplace In Electric Utilities: 2012-2014

A Four-Volume Report by
Newton-Evans Research Company

Available March 26, 2012



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RESEARCH
COMPANY 

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Overview

Newton-Evans' Worldwide Study of the Protective Relay Marketplace: 2012-2014 is a multi-client study which encompasses the world market for protective relays in the electric utility industry. This four volume report series is the sixth worldwide study of protective relays which Newton-Evans has undertaken. Participants in this market study include utility engineers and managers from investor-owned utilities, municipal and provincial utilities, cooperative utilities within the United States and Canada, together with national power systems throughout the world. The study will measure current market sizes and contains projections on a world region basis for the next several years. The entire research program will define the product and market requirements which suppliers must meet in order to successfully participate in one or more of these diverse world market regions.

Newton-Evans Research Company estimates from its earlier 2006 relay market study indicate that the North American protective relay market stood at more than \$400 million for both utility and industrial applications. It will be interesting to see how changes in the world market since 2008 will effect 2012-2014.

Methodology

Field survey work is conducted using a mix of primary research methods including personal interviews, mail surveys, faxes, e-mail and follow-up telephone interviews by Newton-Evans Research Company staff. In addition to discussions with utility managers and influencers, Newton-Evans conducts interviews with protective relay industry officials to gather management impressions about the size, scope, direction and trends in the relay business. Discussions and information exchanges with international suppliers provide additional market insight. Over the past 15 years Newton-Evans has received hundreds and hundreds of completed surveys from utility personnel.

Topics

The survey-based findings in **Volumes 1 (North American Market) and 2 (International Market)** will discuss the following:

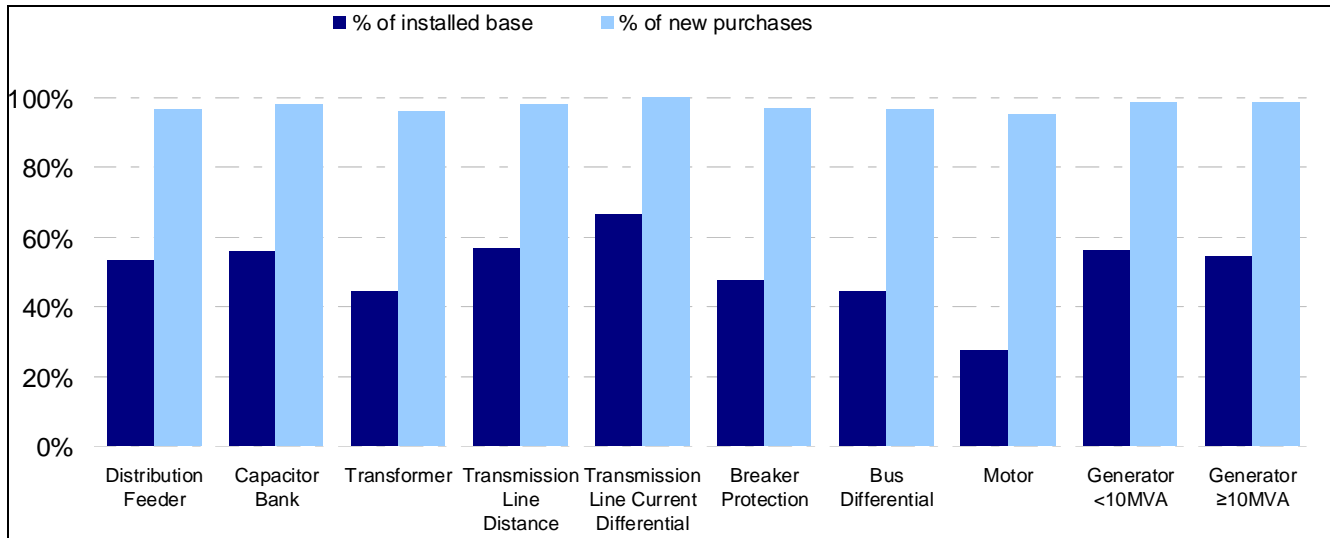
- Number of relays to be purchased over the 2012-2014 period
- Average percentage of digital/microprocessor relays in installed base and planned for new and retrofit applications purchases
- Estimates of annual budgets for protective relay hardware purchases
- Level of testing for new digital relays
- Communications approaches for wide area networks
- Relay communications protocol requirements
- Types of relay scheme redundancy used for microprocessor-based relaying terminals
- Application plans for remedial action schemes (RAS)/special protection systems (SPS)
- Third party services for relay testing
- Level of implementation of IEC 61850
- Uses of IEC 61850 within substation, for protection, control, and SCADA
- Use fiber optics to connect substations
- Outsourcing trends for testing, engineering, integration
- Use of condition based maintenance to reduce maintenance testing time of technicians

Volume 3 will provide a market forecast for the relay market through 2014. The survey sample from volumes 1 and 2 will be analyzed by world percentage of distribution line miles, transmission line miles, number of substations, nameplate capacity (as it applies to generator protection), and number of medium to large transformers included in the sample. This data is then used to estimate factory shipments according to type of relay (electromechanical vs. solid state), market segment (North American utilities, International utilities, and IPP/Industrial/OEMs), relay application (substation equipment, generators/motors, transmission lines, or distribution feeders), and market share by relay manufacturer.

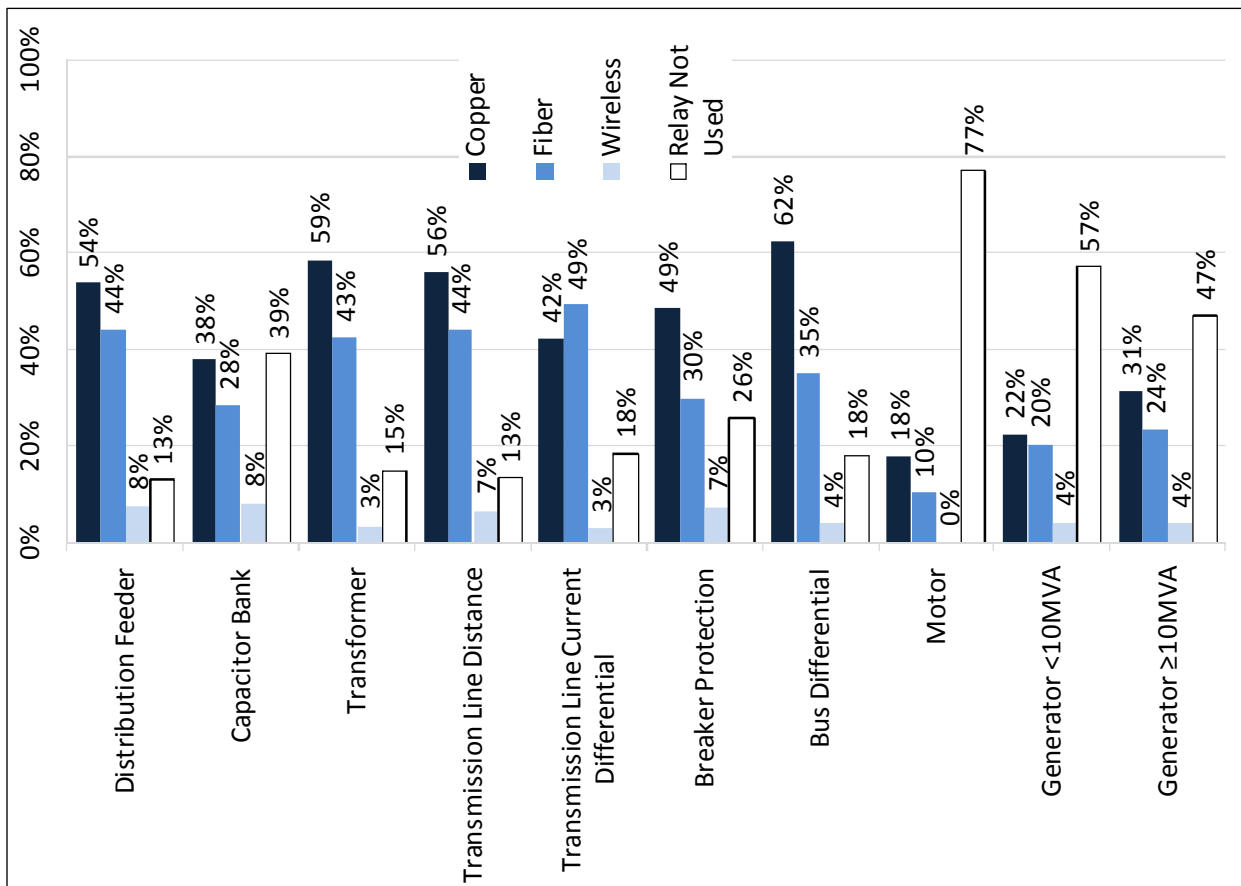
Volume 4 profiles several of the major relay manufacturers and related equipment providers such as ABB, Alstom Grid, Basler, Beckwith, Cooper, Cutler Hammer, FKI, GE Multilin, Nari, RFL, Schneider, SEL, Siemens, and ZIV. Product descriptions and key contacts are provided, as well as reported 2010 and 2011 revenue where available.

Here are some examples of facts and figures Newton-Evans will be revisiting in 2012:

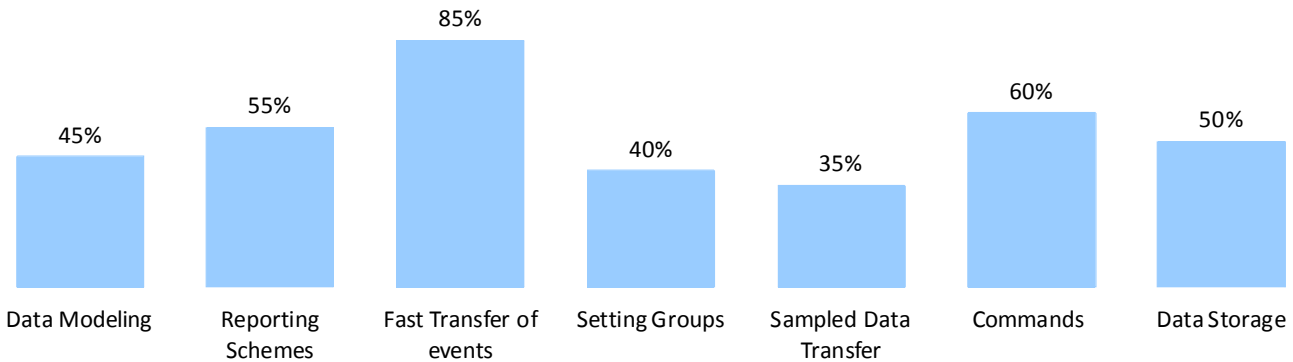
Percentage of Digital Relays Installed in North America (Based on the 2009 survey)



North American Requirements for Relay Protection Communications (Based on the 2009 survey)



Features of IEC 61850 to be used in new projects by International Electric Utilities



Ordering Information

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