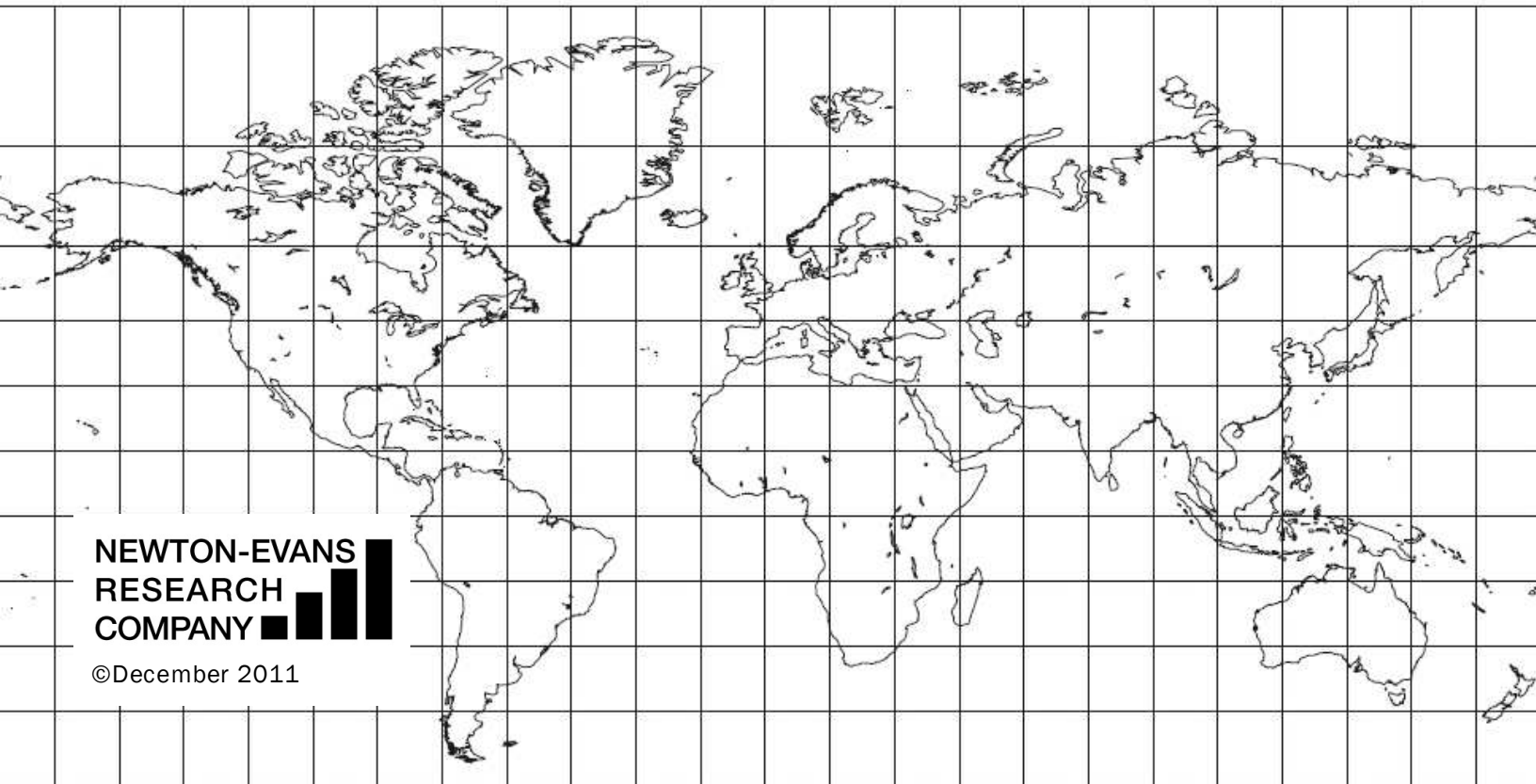
The Worldwide Smart Grid Market in mid-2011: A Reality Check and Five Year Outlook Through 2015

A Three-Volume Report Available from Newton-Evans Research Company



NEWTON-EVANS RESEARCH COMPANY

Overview

The purpose of this study is to determine market trends and usage patterns for various smart grid technologies and initiatives using the "facts on the ground" such as the implementation of electricity pricing models, demand response programs, and current/future smart meter deployment.

Methodology

The facts reported in this study are based on two surveys sent out by Newton-Evans over the course of the first and second quarters of 2011.

The first survey queried U.S. State Public Service Commissions, Policy Makers and Utility Regulatory Authorities on smart grid policy topics such as the implementation and type of dynamic pricing, requirements for renewable energy resources, rate schedules for plug-in vehicles, and other aspects. Responses were received from 41 of 51 utility commissions contacted. Additional secondary research on regulatory agencies outside the U.S. was also conducted to supplement this. There is some regulatory information concerning smart grid initiatives from Brazil, China, India and Mexico included in this volume.

The second survey queried electric utilities worldwide. Similar to the PSC survey, the utility survey also addressed plans for smart meters and associated dynamic pricing plans, the possibility of vehicle-to-grid (V2G) and/or vehicle-to-infrastructure, types of customer groups affected by pilot programs, etc. The survey also inquires into plans for and current implementations of smart grid technologies and features such as distribution automation, demand response and load management, smart meters, substation automation, SCADA, FDIR, home area networks, etc., in addition to the key drivers for success behind current initiatives. Utilities were also asked to identify which smart grid initiatives were slowest to develop and to indicate the reasons for this slow implementation. Responses were received from 112 electric utilities in 31 countries, representing approximately 150 million electricity end users.

Topics

The survey-based findings in **Volume 1** discuss the following:

- Smart Meters and Dynamic Pricing as utility trends
- Pilot programs for new pricing models
- Estimate of Smart Meter deployments
- Use and plans for Demand Response and/or Load Management programs
- Ranking of Smart Grid initiatives according to "efficiency of investment"
- Drivers behind Smart Grid initiatives
- Tends in the development of Home Area Networks, Vehicle-to-Grid and Vehicle-to-Building technologies
- Requirements of Public Utility Commissions for electric utility Smart Grid initiatives

Volume 2 of this report series is a compendium of insights gleaned from multi-client and contracted studies related to "smart grid" developments. These studies are all quite recent, dating from fourth quarter 2007 through mid-2011, and are a mix of North American and global market research programs.

The sections included in this volume form the core components of the evolving smart grid. These are: control systems for energy management, supervisory control, distribution management; substation automation and integration; demand response and load management; distribution automation; transmission and distribution infrastructure; automated metering; and protection and control and the related evolution of phasor measurement and teleprotection. It is also vital to include discussions of communications and security topics, without which the evolving smart grid would not be feasible.

Volume 3 describes the smart grid-related market outlook through 2015 based on insights gathered from dozens of recently completed industry and utility surveys and secondary research activities conducted by Newton-Evans' staff. Importantly for this volume, equipment manufacturers, systems integration specialists, consultants and software developers, together with other representatives of the power industry's "supply side" were surveyed or interviewed for their outlooks and opinions on where the "smart grid" market is headed in the near term (2011-2012) and the mid-term (2013-2015).

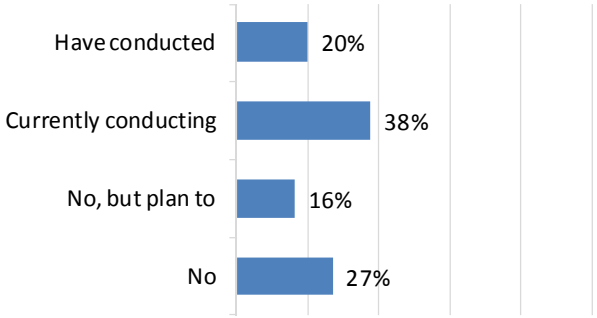
Volume 1 (106 pages) Table of Contents

Volume 2 (85 pages) Table of Contents

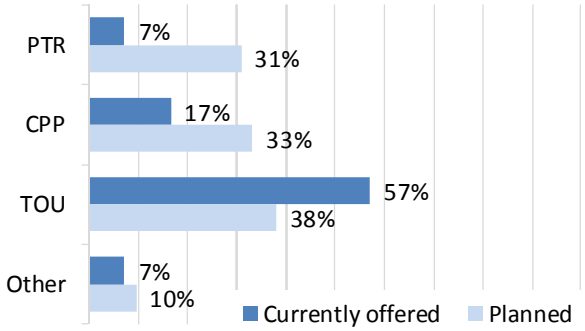
Volume 3 (52 pages) Table of Contents

Volume 3 includes market forecasts by world region through 2015 on Control Systems (Systems+ Integration, Third Party Svcs); Outage Management; Substation Automation; AMI- AMR; Protection & Control; Utilty Telecomms for Control Systems and AMI; Distribution Automation (software and equipment, and DA communications)

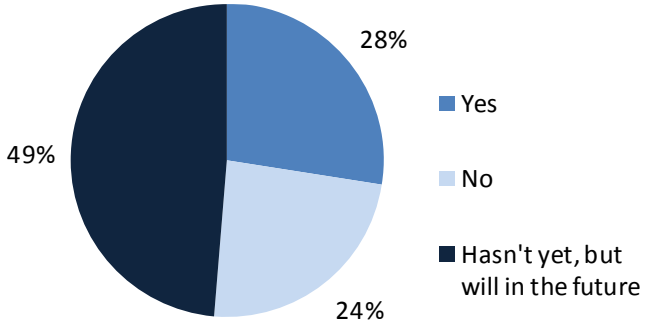
Has your utility conducted a pilot program (or is currently conducting a pilot program) to determine customer acceptance of a Dynamic Pricing model?



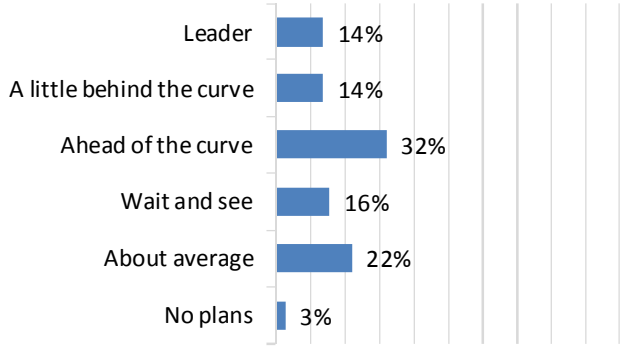
Which pricing models are currently being offered in the pilot program, or are being planned?



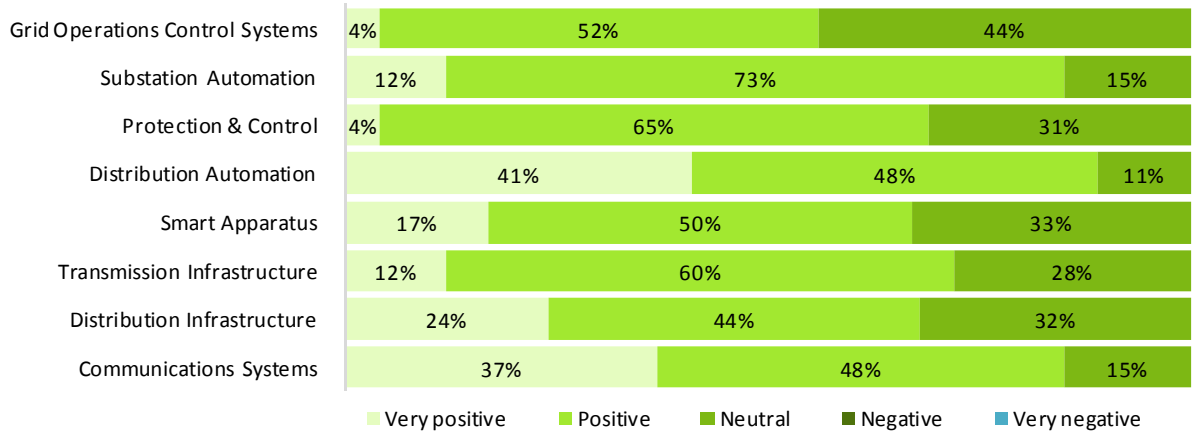
Has your utility's implementation of smart grid initiatives provided opportunities for your LM/DR programs to expand?



With regard to investing in the smart grid within your peer group (i.e. similar size/type), please provide your opinion on your utility's standing.



Outlook for utility CAPEX spending for smart grid components over the near term (2011-2012)



Ordering Information

To order the Newton-Evans report, *"The Worldwide Smart Grid Market in mid-2011: A Reality Check and Five Year Outlook Through 2015,"* Email order form to info@newton-evans.com or fax it to +1 410 750 7429. Please call 800 222 2856 or +1 410 465 7316 to confirm. *Reports will be provided by PDF and sent via email; be sure to include a valid email address.*

The Worldwide Smart Grid Market in mid-2011: A Reality Check and Five Year Outlook Through 2015

Three Volume Report - $3,750.00

Name: _____ Job Title: _____

Company: _____ Email: _____

Address: _____ City: _____ State: _____

Zip/Postal: _____ Country: _____ Phone: _____

☐ Check for: $ _____ …is enclosed ☐ Our PO# is _____

Credit Card: ☐ VISA ☐ MasterCard ☐ American Express ☐ Discover

Card Number: _____ Exp. Date: ____ / ____ CVV2: _____

Name on Card: _____

Billing Address (if different from above) _____

City: _____ State: _____ Zip/Postal: _____

For more information, please contact Newton-Evans at
10176 Baltimore National Pike, Suite 204
Ellicott City, Maryland 21042
Tel: 410-465-7316 Fax: 410-750-7429 Toll Free: 800-222-2856
E-mail: cnewton@newton-evans.com Website: www.newton-evans.com