

# Substation Automation Market Research

FIVE-YEAR MARKET ANALYSIS AND TECHNOLOGY FORECAST THROUGH 2022

## MARKET ELECTRIFIED BY DIGITAL SUBSTATIONS AND MICROGRIDS

Substation automation includes intelligent electronic devices (IEDs), control commands from remote users, and automation and control capabilities **within** the substation fence to provide intelligent information to properly control the power system devices to ensure that end users receive uninterrupted power service from their electric utilities.

17 percent (1.2 billion people) of the global population lack access to electricity, and the other 83 percent want more reliable and efficient electricity. Developing countries need to double their electrical power output to meet rising demand, and by 2035, they will represent 80 percent of the total growth in both energy production and consumption.

This pent-up demand will be satisfied by additional substations that will require substation automation. This will bring new concepts, if not necessarily new technologies, into play.

The future is digital substations, and these will come about as retrofits and new substations.

Microgrids are going to be a critical element in the developing markets and for geographically islanded customers. Microgrid growth will be driven by increased reliance on renewables in the energy mix and supported by new developments in battery storage.

For more information, please visit us at [www.arcweb.com/market-studies/](http://www.arcweb.com/market-studies/).

## STRATEGIC ISSUES

Owner-operators and governments tend not to be early adopters, but the demand (need) for reliable electricity in the developing markets will drive wholesale changes in the traditional grid infrastructure.

- Are different strategies required for new installations vs. retrofit? Developed vs. undeveloped markets?
- Will the developing markets create different opportunities?
- What 'new' substation technologies need to be considered?
- Is it possible to enter the single largest market?

## RESEARCH FORMATS

This research is available as a Market Intelligence Workbook (Excel) and/or a concise, executive-level Market Analysis Report (PDF), with or without detailed charts.

## RESEARCH FOCUS AREAS

### STRATEGIC ANALYSIS

Major Trends  
Regional, Industry, and End User Trends  
Strategic Recommendations

### COMPETITIVE ANALYSIS

Market Shares of the Leading Suppliers  
Market Shares by Region  
    North America  
    Europe, Middle East, Africa  
    Asia  
    Latin America  
Market Shares by Substation Type  
    Transmission  
    Distribution  
    Collection  
Market Shares by Revenue Category  
    Hardware  
    Software  
    Services  
Market Shares by Hardware Type  
Market Shares by Software Type  
Market Shares by Service Type  
Market Shares by Project Type  
    New  
    Retrofit  
Market Shares by Project Size  
    Large > \$1 Million

Medium \$250K - \$1M  
Small <\$250K  
Market Shares by Substation Ownership  
    Government Agency or State Owned  
    Investor Owned  
    Rural Electric Co-op  
Market Shares by Sales Channel

### MARKET FORECASTS & HISTORIES

Total Substation Automation Business  
Revenues by Region  
Revenues by Substation Type

Revenues by Category  
Revenues by Hardware Type  
Revenues by Software Type  
Revenues by Service Type  
Revenues by Project Type  
Revenues by Project Size  
Revenues by Substation Ownership  
Revenues by Sales Channel

### INDUSTRY PARTICIPANTS

The research identifies all relevant suppliers serving this market.

The Worldwide Substation Automation Market

