

Table of Contents

Executive Summary	1
I. Market and Technology Trends	7
A. Market Trends.....	8
B. Technology Trends.....	12
C. Case Studies	17
RuggedCom/Grant County PUD (Public Utility District)	17
Great River Energy (G&T Cooperative).....	19
Alcatel-Lucent/Grand River Dam Authority	25
Alcatel-Lucent/Energy Australia.....	29
Los Angeles Department of Water and Power.....	33
Alcatel-Lucent/Iberdrola.....	37
II. Legal and Regulatory Issues	39
A. The Energy Policy Act 2005	39
B. North American Electric Reliability Corporation (NERC) Critical Infrastructure Protection (CIP) Regulations.....	44
C. European Regulatory Initiatives.....	45
III. Next-Generation Applications.....	47
A. Communications Network.....	51
An Internet Protocol (IP) -based Future	52
Leveraging the Communications Network.....	54
Smart Appliance/BPL.....	55
B. Automated Meter Reading (AMR), and Advanced Metering Infrastructure (AMI)	56
Asset Management and Usage Forecasting	57
Dynamic Pricing.....	57
C. Supply Automation	59

	Demand Response	60
	Load Profiling Balancing	63
	Distribution Network Diagnosis	63
	Remote Surveillance and Control.....	63
D.	Supply Control and Optimization	64
	Supply Monitoring, Analysis and Quality Control.....	64
	Demand-Side Management (DSM)	65
	Automated Load Leveling, Shedding and Shifting.....	66
	Automatic Capacitor Bank Analysis and Control.....	67
IV.	Channel Analysis.....	69
A.	Automation System Selection.....	71
B.	Planning & Deployment	72
V.	Operational Analysis.....	77
	Asset Management Analysis.....	78
	Human Resources Analysis.....	78
	Customer Services Analysis	79
	Production, Planning, and Open-Market Energy Purchasing	80
	Field Service, Maintenance, and Restoration Operations.....	81
	Improved Pricing and Billing Operations	81
VI.	Financial Issues	83
A.	AMR Implementation Example.....	83
B.	Controlling Peak-Loads.....	85
	Conclusion	87
	Appendix I – Vendor Overview.....	89
	Communications Network Vendors.....	89
	Advance Metering Infrastructure (AMI) Vendors.....	117
	Supply Automation Vendors	133
	Supply Control and Optimization Vendors	140
	Appendix II – Stakeholder Groups	147

Industry Associations	147
Research Initiatives	149
Development/IT.....	151
User Groups/Education.....	152
Appendix III – Acronyms & Abbreviations	155