

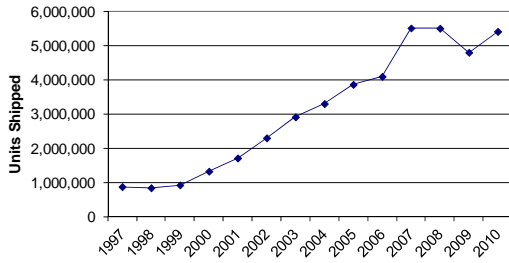
# **The Scott Report: North American Deployments of Automated Metering Devices**

**Fourteenth Edition**

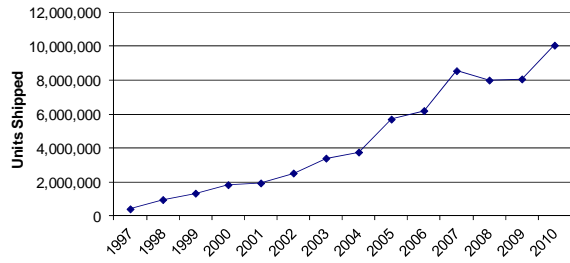
**Howard A. Scott, Ph.D.**

**COGNYST** ADVISORS

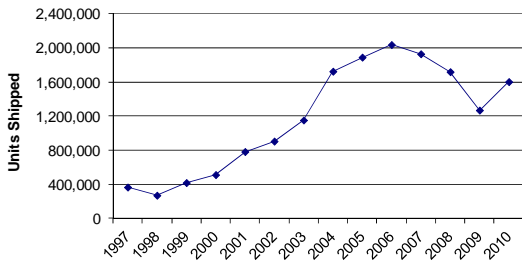
**Total Annual Shipments - Water**



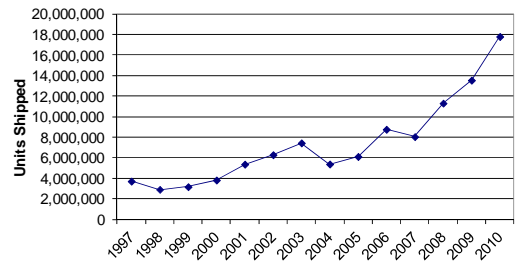
**Total Annual Shipments - 25K or Less**



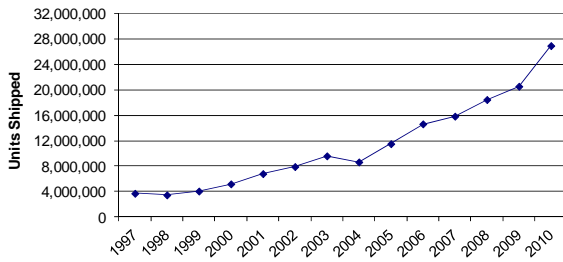
**Total Annual Shipments - 25K to 125K**



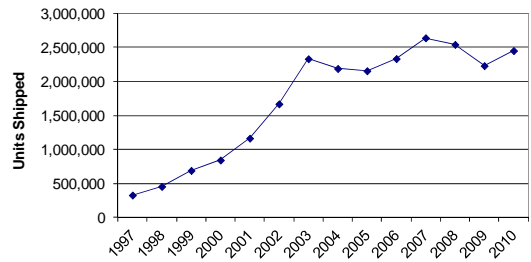
**Total Annual Shipments - More Than 125K**



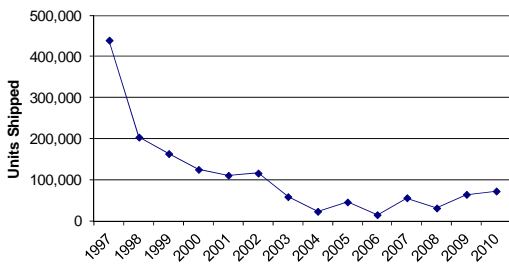
**Total Annual Shipments - RF**



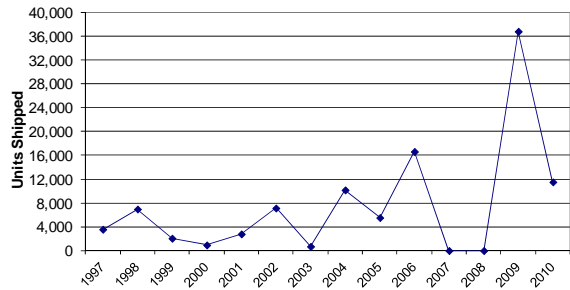
**Total Annual Shipments - PLC**



**Total Annual Shipments - Telephone**



**Total Annual Shipments - Other Comm.**



6.1.2 Annual Shipments

The tables below show annual shipments by vendor from 2006 through 2010.

<b>Vendor</b>	Shipped In '10	Shipped In '09	Shipped In '08	Shipped In '07	Shipped In '06
Itron	11,260,934	5,311,348	7,171,026	6,731,466	8,084,468
Silver Spring Networks	4,565,804	3,377,291	256,600	53,600	0
Sensus	3,559,278	3,530,978	2,247,051	1,203,374	844,032
Aclara	3,279,402	3,394,654	3,741,825	2,512,398	1,584,766
Landis+Gyr	2,237,364	2,300,791	1,976,785	2,550,220	2,853,392
Neptune	1,384,458	1,207,113	1,519,753	1,375,908	1,001,765
Badger	1,130,011	1,035,066	1,192,740	1,019,866	954,686
Elster	1,086,227	1,463,004	1,327,975	1,463,575	875,525
Master Meter	471,517	416,146	626,256	565,060	394,757
Cannon	254,528	303,861	398,008	241,049	167,719
Echelon	83,000	37,000	18,900	0	100
Tantalus	77,675	31,773	600	0	0
SmartSynch	51,639	38,514	26,366	18,242	2,986
Trilliant	12,482	426,902	518,620	296,201	28,454
Eka Systems	0	50	612	65	50
Datamatic	0	0	0	513,754	181,637
Primestone	0	0	0	0	10,000
muNet	0	0	0	0	6,621
SAPPEL	0	0	0	0	5,955
Metretek	0	0	0	0	3,237
Others	0	0	0	-15,075	-6,493
<b>Total:</b>	<b>29,454,319</b>	<b>22,874,491</b>	<b>21,023,117</b>	<b>18,529,703</b>	<b>16,993,657</b>

8.3.6 Shipments to Each State or Province

				USA				
Listed by Cumulative Units Shipped					Listed by # Projects			
State	Cumulative Shipped	# Projects	% of Total Shipped		State	Cumulative Shipped	# Projects	% of Total Projects
Misc.	4,099,081	306	3.49%		California	2,488,160	622	7.09%
Texas	3,234,301	581	6.63%		Texas	3,234,301	581	6.63%
Pennsylvania	2,600,983	218	2.49%		Illinois	1,952,192	468	5.34%
Florida	2,570,306	394	4.49%		Florida	2,570,306	394	4.49%
California	2,488,160	622	7.09%		Wisconsin	1,033,967	383	4.37%
New York	1,976,942	337	3.84%		Ohio	1,576,957	365	4.16%
Illinois	1,952,192	468	5.34%		New York	1,976,942	337	3.84%
Ohio	1,576,957	365	4.16%		Misc.	4,099,081	306	3.49%
North Carolina	1,544,446	269	3.07%		Michigan	1,508,916	289	3.30%
Michigan	1,508,916	289	3.30%		Georgia	1,292,106	277	3.16%
New Jersey	1,478,463	198	2.26%		North Carolina	1,544,446	269	3.07%
Georgia	1,292,106	277	3.16%		Massachusetts	1,032,996	243	2.77%
Colorado	1,140,646	220	2.51%		Minnesota	889,123	240	2.74%
Wisconsin	1,033,967	383	4.37%		Indiana	695,181	228	2.60%
Massachusetts	1,032,996	243	2.77%		Colorado	1,140,646	220	2.51%
Minnesota	889,123	240	2.74%		Pennsylvania	2,600,983	218	2.49%
South Carolina	739,169	155	1.77%		Tennessee	735,921	217	2.48%
Tennessee	735,921	217	2.48%		Missouri	560,168	210	2.40%
Arizona	712,371	118	1.35%		Washington	387,190	200	2.28%
Indiana	695,181	228	2.60%		New Jersey	1,478,463	198	2.26%
Virginia	686,282	155	1.77%		Kentucky	435,967	174	1.98%
Nevada	639,125	49	0.56%		South Carolina	739,169	155	1.77%
Alabama	602,345	137	1.56%		Virginia	686,282	155	1.77%
Missouri	560,168	210	2.40%		Iowa	371,256	155	1.77%
Utah	478,934	147	1.68%		Arkansas	252,004	151	1.72%
Kentucky	435,967	174	1.98%		Utah	478,934	147	1.68%
Connecticut	391,051	52	0.59%		Alabama	602,345	137	1.56%
Washington	387,190	200	2.28%		Kansas	300,549	133	1.52%
Iowa	371,256	155	1.77%		Arizona	712,371	118	1.35%
West Virginia	364,965	36	0.41%		Louisiana	316,786	101	1.15%
Louisiana	316,786	101	1.15%		Oregon	244,519	100	1.14%
Kansas	300,549	133	1.52%		Mississippi	105,678	96	1.10%
Hawaii	267,110	21	0.24%		Maryland	255,658	72	0.82%
Nebraska	256,145	62	0.71%		South Dakota	143,832	71	0.81%
Maryland	255,658	72	0.82%		Oklahoma	152,029	65	0.74%
Arkansas	252,004	151	1.72%		Idaho	84,569	64	0.73%
Rhode Island	245,577	44	0.50%		Nebraska	256,145	62	0.71%
Oregon	244,519	100	1.14%		Montana	146,359	55	0.63%
District Of Columbia	171,813	10	0.11%		Connecticut	391,051	52	0.59%
New Mexico	162,341	41	0.47%		Nevada	639,125	49	0.56%
Oklahoma	152,029	65	0.74%		New Hampshire	123,075	47	0.54%
Montana	146,359	55	0.63%		Rhode Island	245,577	44	0.50%
South Dakota	143,832	71	0.81%		Wyoming	102,371	43	0.49%
Delaware	131,565	39	0.44%		New Mexico	162,341	41	0.47%
Maine	127,097	28	0.32%		Delaware	131,565	39	0.44%
New Hampshire	123,075	47	0.54%		West Virginia	364,965	36	0.41%
Mississippi	105,678	96	1.10%		North Dakota	84,320	33	0.38%
Wyoming	102,371	43	0.49%		Alaska	25,525	30	0.34%
Idaho	84,569	64	0.73%		Maine	127,097	28	0.32%
North Dakota	84,320	33	0.38%		Hawaii	267,110	21	0.24%
Alaska	25,525	30	0.34%		Vermont	13,620	13	0.15%
Vermont	13,620	13	0.15%		District Of Columbia	171,813	10	0.11%
Puerto Rico	364	5	0.06%		Puerto Rico	364	5	0.06%
<b>Total:</b>	<b>41,932,416</b>	<b>8,767</b>			<b>Total:</b>	<b>41,932,416</b>	<b>8,767</b>	

## 11.8 Shipments to Water Utilities That Are Investor Owned

### 11.8.1 Cumulative Shipments

Listed by Cumulative Units Shipped					Listed by # Projects				
Vendor	Cumulative Shipped	% '10 Shipped	% '09 Shipped	# Proj.	Vendor	Cumulative Shipped	% '10 Shipped	% '09 Shipped	# Proj.
Neptune	2,121,110	51.0%	48.6%	106	Badger	478,293	11.5%	11.8%	228
ltron	963,997	23.2%	24.2%	104	Sensus	217,671	5.2%	5.7%	157
Badger	478,293	11.5%	11.8%	228	Neptune	2,121,110	51.0%	48.6%	106
Sensus	217,671	5.2%	5.7%	157	ltron	963,997	23.2%	24.2%	104
Master Meter	132,400	3.2%	3.6%	87	Master Meter	132,400	3.2%	3.6%	87
Datamatic	68,635	1.7%	1.9%	21	RAMAR	19,108	0.5%	0.5%	30
Base-10	55,700	1.3%	1.5%	1	Datamatic	68,635	1.7%	1.9%	21
Elster	40,509	1.0%	1.1%	18	Elster	40,509	1.0%	1.1%	18
Aclara	37,169	0.9%	0.4%	11	Aclara	37,169	0.9%	0.4%	11
RAMAR	19,108	0.5%	0.5%	30	Landis+Gyr	12,138	0.3%	0.3%	2
Landis+Gyr	12,138	0.3%	0.3%	2	First Point Energy	5,487	0.1%	0.2%	2
First Point Energy	5,487	0.1%	0.2%	2	Base-10	55,700	1.3%	1.5%	1
InterWave	3,000	0.1%	0.1%	1	InterWave	3,000	0.1%	0.1%	1
UTICS	821	0.0%	0.0%	1	UTICS	821	0.0%	0.0%	1
Trilliant	50	0.0%	0.0%	1	Trilliant	50	0.0%	0.0%	1
<b>Total:</b>	<b>4,156,088</b>			<b>770</b>	<b>Total:</b>	<b>4,156,088</b>			<b>770</b>

Listed by Cumulative Units Shipped				
Architecture	Cumulative Shipped	% '10 Shipped	% '09 Shipped	# Proj.
Neptune - RF	1,768,223	42.5%	38.9%	87
ltron	1,202,789	28.9%	30.6%	161
Neptune - Telephone	325,604	7.8%	8.9%	11
Sensus - RF	214,919	5.2%	5.7%	144
Badger - Orion	190,600	4.6%	4.4%	116
Master Meter - 3G	113,140	2.7%	3.1%	67
Elster/AMCO (Trace)	79,151	1.9%	2.2%	56
Datamatic	68,635	1.7%	1.9%	21
Base-10	55,700	1.3%	1.5%	1
Aclara - RF	48,550	1.2%	0.7%	15
RAMAR	37,239	0.9%	1.0%	48
ltron SaveSource	12,392	0.3%	0.0%	4
Landis+Gyr - AMR	12,149	0.3%	0.3%	3
Badger - Telephone	8,724	0.2%	0.2%	10
First Point Energy	5,487	0.1%	0.2%	2
InterWave	3,000	0.1%	0.1%	1
Aclara - PLC	2,444	0.1%	0.1%	1
Neptune - R450	1,796	0.0%	0.0%	2
Sensus - Telephone	1,325	0.0%	0.0%	6
Master Meter - Telephone	1,195	0.0%	0.0%	1
Sensus Flexnet	1,127	0.0%	0.0%	6
UTICS	821	0.0%	0.0%	1
Master Meter - Other	434	0.0%	0.0%	2
Sensus FixNet	300	0.0%	0.0%	1
Badger - Galaxy	294	0.0%	0.0%	2
Trilliant - Telephone	50	0.0%	0.0%	1
<b>Total:</b>	<b>4,156,088</b>			<b>770</b>