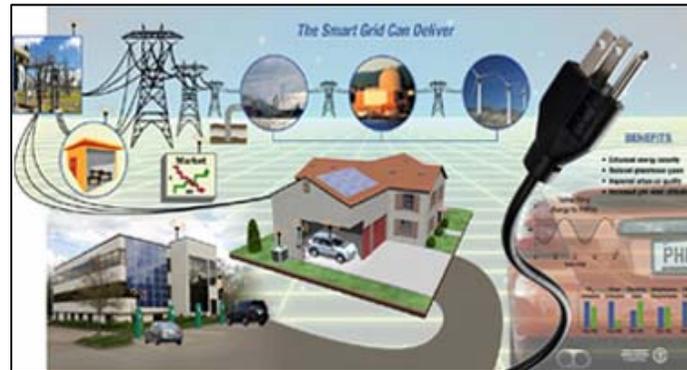


Smart Grid: Core Firms in the Research Triangle



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Prepared for:
Research Triangle CleanTech Cluster

April 8, 2011
Durham, NC

Manufacturing Climate Solutions

15 Clean Tech studies by CGGC

LED Lighting

Efficient Windows

Residential Re-insulation

Water Heaters

Hog Waste Treatment

Recycled Energy

Electric Vehicle Batteries

Hybrid Trucks

Rail Cars

Public Transit Buses

Anti-Idling for Trucks

Wind Power

Solar Power

Carbon Capture & Storage

Smart Grid



U.S. Smart Grid

Finding new ways to cut carbon
and create jobs



April 19, 2011

Marcy Lowe, Hua Fan
and Gary Gereffi



Contributing CGGC researcher: Ghada Ahmed

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National study
to be released
April 19, 2011

Upcoming Research: NC Focus

Phase I (forthcoming)

- Research Triangle focus
- X Core firms
- 13-county map
- Each firm's "footprint"
- Taxonomy strengths and gaps (preliminary)

Phase II (seeking funding)

- North Carolina focus
- Core and linked industries
- Statewide map
- Value chain strengths and gaps (measured in number of firms at core and linked industry levels)
- Supporting industry assets (R&D, workforce development, etc.)

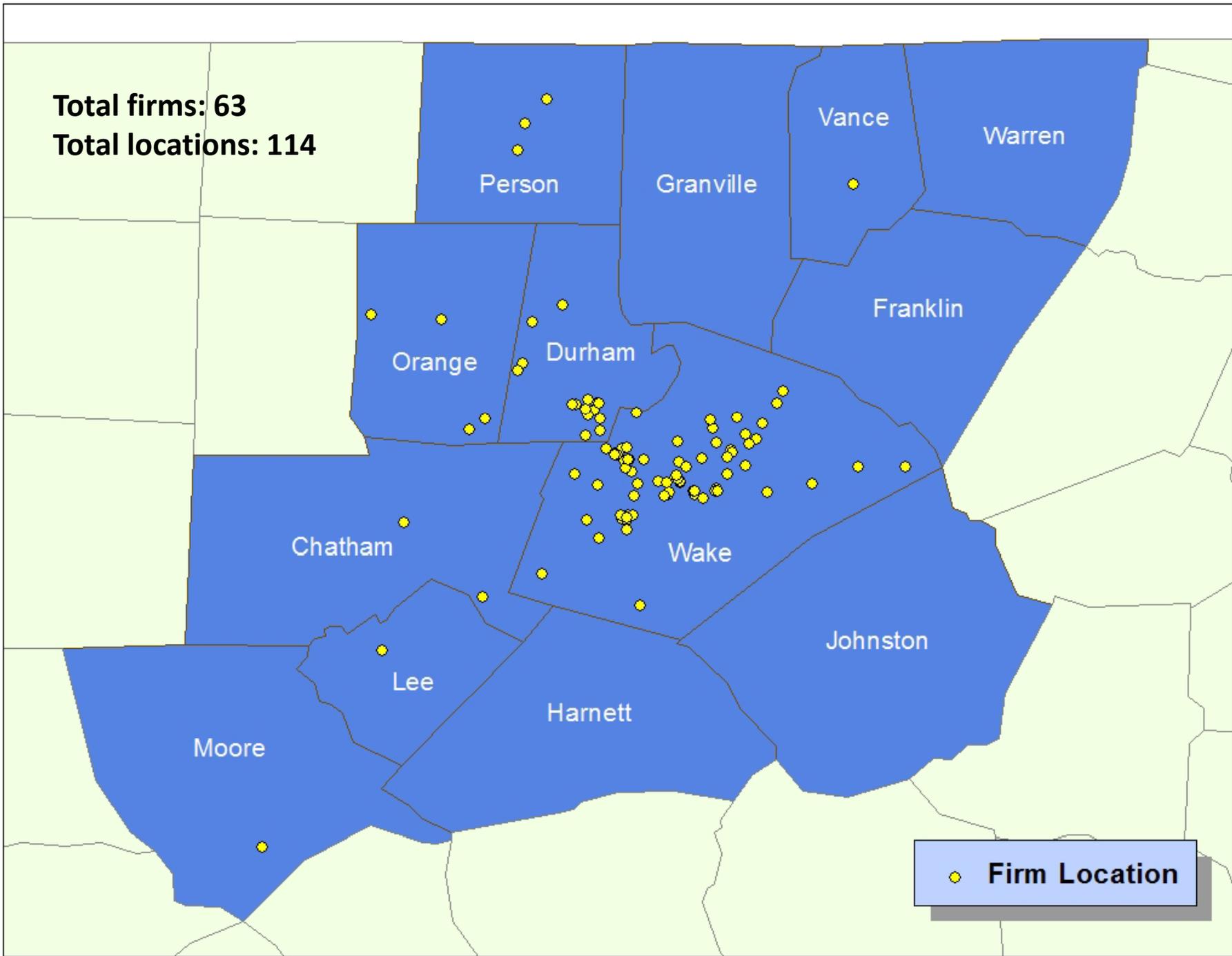
63 core firms in the Triangle

- IT and communications (34)
 - Alcatel-Lucent
 - Elster
 - Google
 - Intel
- Smart T&D hardware (5)
 - ABB
 - GE
 - Schneider Electric
- Energy management (25)
 - Cisco Systems
 - Honeywell
 - Johnson Controls
 - Siemens Energy
- Telecom service (3)
 - AT&T
 - Sprint
 - Verizon
- System integration (2)
 - IBM
 - Red Hat

14 core firms elsewhere in NC

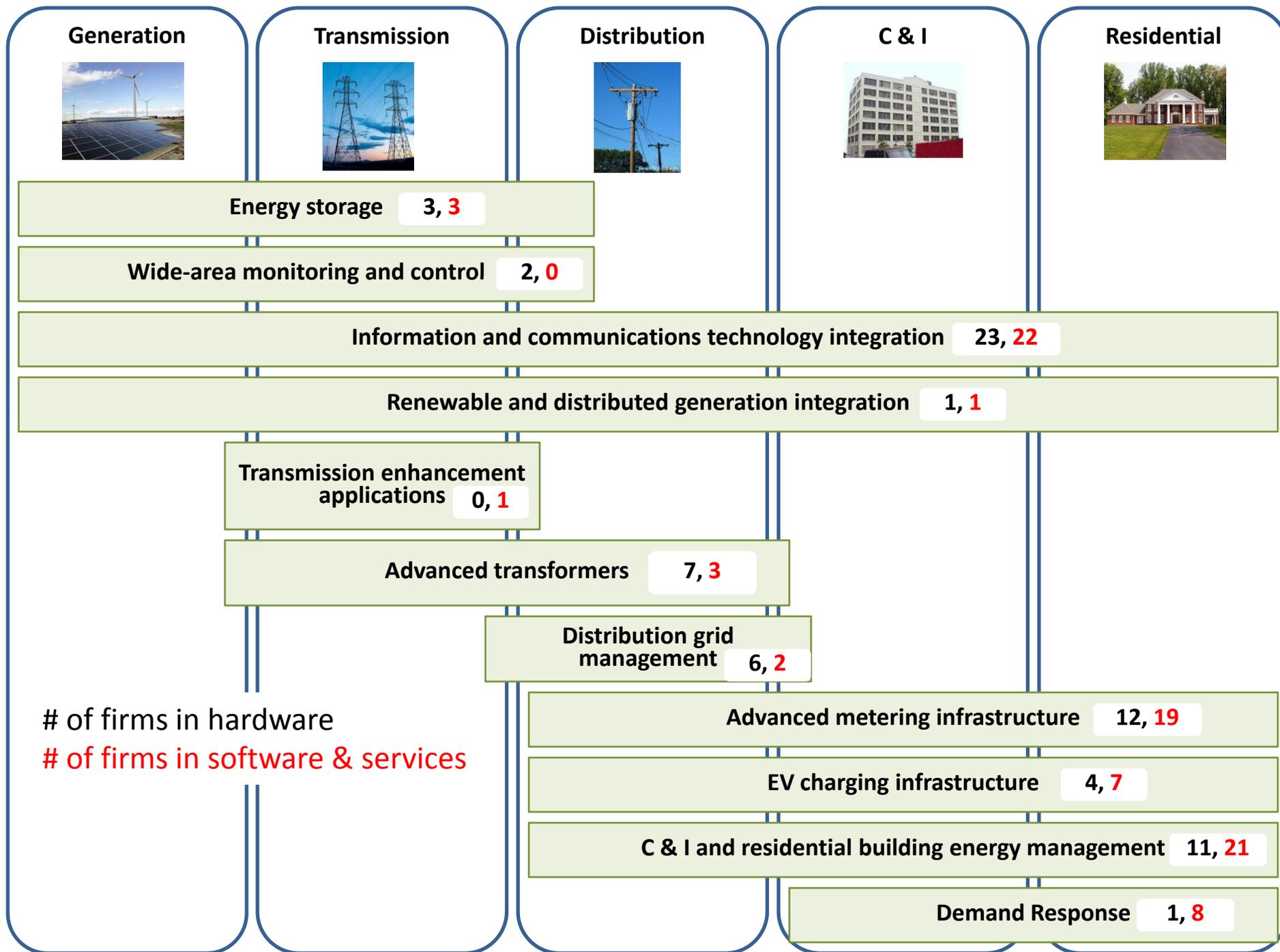
- Charlotte
 - Accenture
 - Capgemini
 - S&C Electric Company
 - Microsoft
 - Oracle
- Greensboro
 - RF Micro Devices
- Shelby
 - Cooper Power Systems
 - Novatech Process Solutions
- Wilmington
 - Sequentric

Total firms: 63
Total locations: 114



Company	Energy storage	Wide-area monitoring and control	Information and communications	Renewable and distributed generation	Transmission enhancement	Advanced transformers	Distribution grid management	Advanced metering applications	EV charging	CI and residential infrastructure	Demand response
29 Honeywell							•		• Δ Δ		
30 IBM		Δ					Δ		Δ		
31 Intel					Δ				Δ		
32 Itron		•					• Δ				
33 Johnson Controls		•							• Δ		
34 KEMA	Δ				Δ		Δ	Δ	Δ	Δ	
35 Lockheed Martin									Δ		

• Hardware Δ Software & Services



Thank you for your attention!

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