

# North American Microgrids 2015: Advancing Beyond Local Energy Optimization

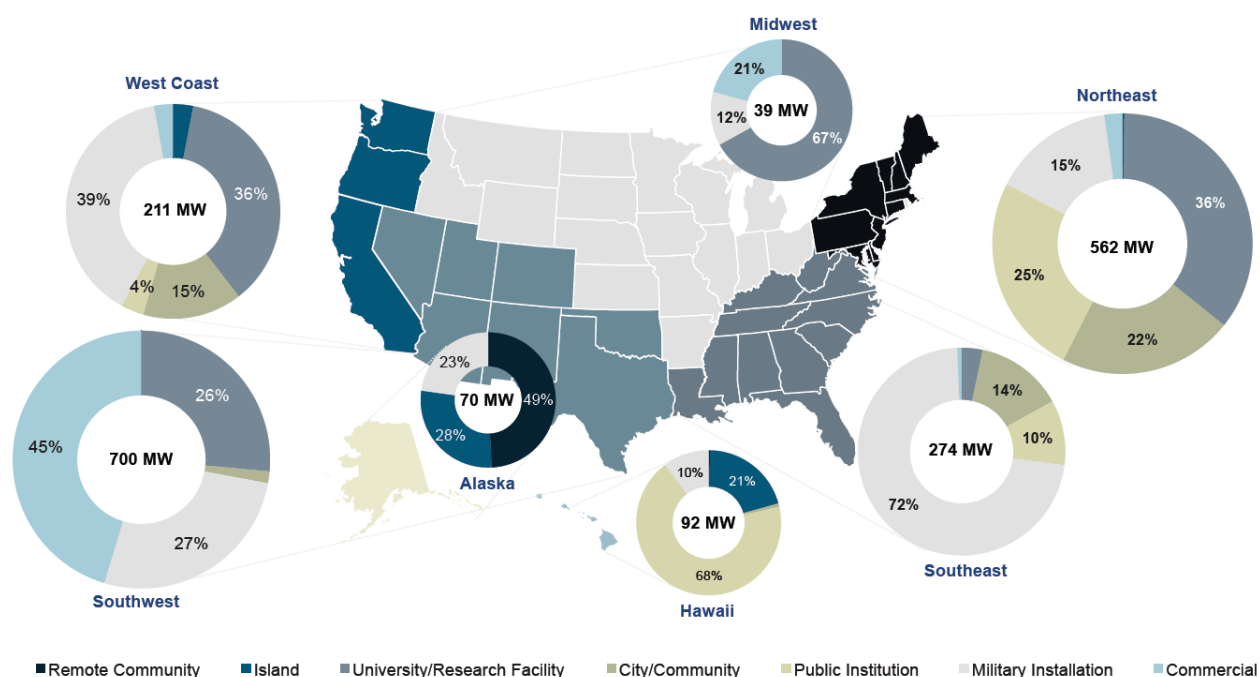
Omar Saadeh | Senior Analyst, Grid Edge



The microgrid market is undergoing a transformation from a niche application intended for military bases and remote communities to a grid modernization tool for utilities, cities, communities and public institutions. This change is expected to grow the market opportunity by over 3.5 times between 2015 and 2020, to over \$829 million annually.

The recent wave of announced projects and state-level resiliency programs are enabling further development and standardization of microgrid technologies for the next generation of advanced, more renewable-heavy projects. Substantial regulatory and legislative changes to utility franchise rights and rate structures (already underway in states such as New York, Maryland and Illinois) are projected to increase microgrid value propositions, further accelerating adoption in the later years of the forecast period. As solar PV adoption rates increase, flexible microgrid solutions are becoming a significant component of renewable integration strategies in regions extending beyond high penetration states such as Hawaii and California.

## Regional Total Microgrid Generation Capacities by End-User Type



Donut graphics are scaled according to generation capacity (operational and planned)  
Generation capacities do not account for energy storage

Source: GTM Research

This 120-plus slide-based report provides a comprehensive analysis of the current and future U.S. microgrid market, including capacity and opportunity forecasts through 2020, competitive positioning of key vendors, and market drivers and barriers that shape the current and emerging microgrid landscape. The report also identifies trends and costs across microgrid market segments and describes key operational and planned deployments, identifying specific challenges and opportunities.

The analysis builds upon data collected in GTM Research's microgrid database. The included database features a list of 216 microgrid deployments and expansions that are currently planned, under construction or operational.

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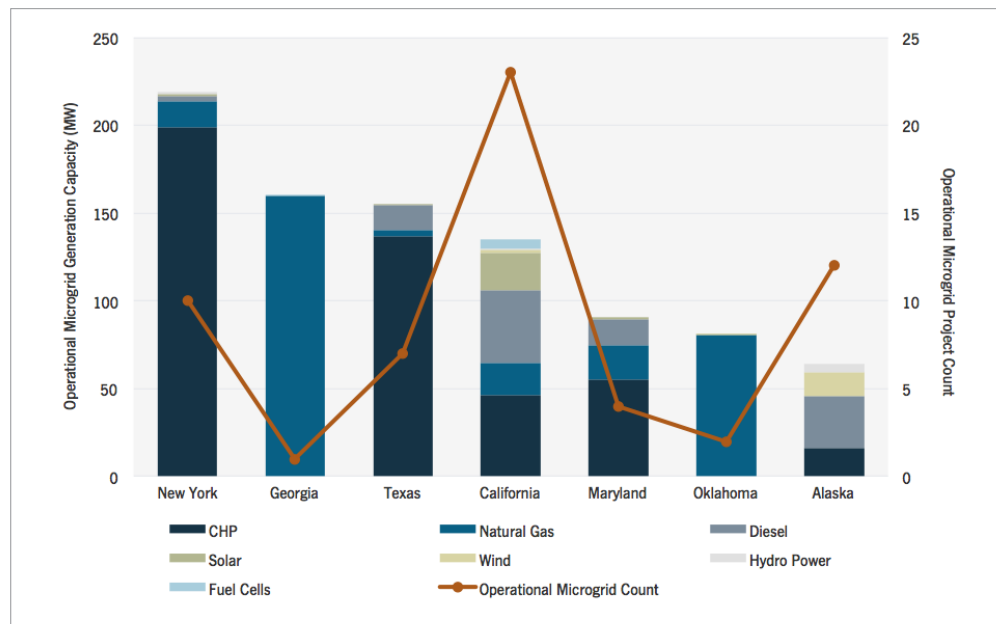
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## Sample Figures

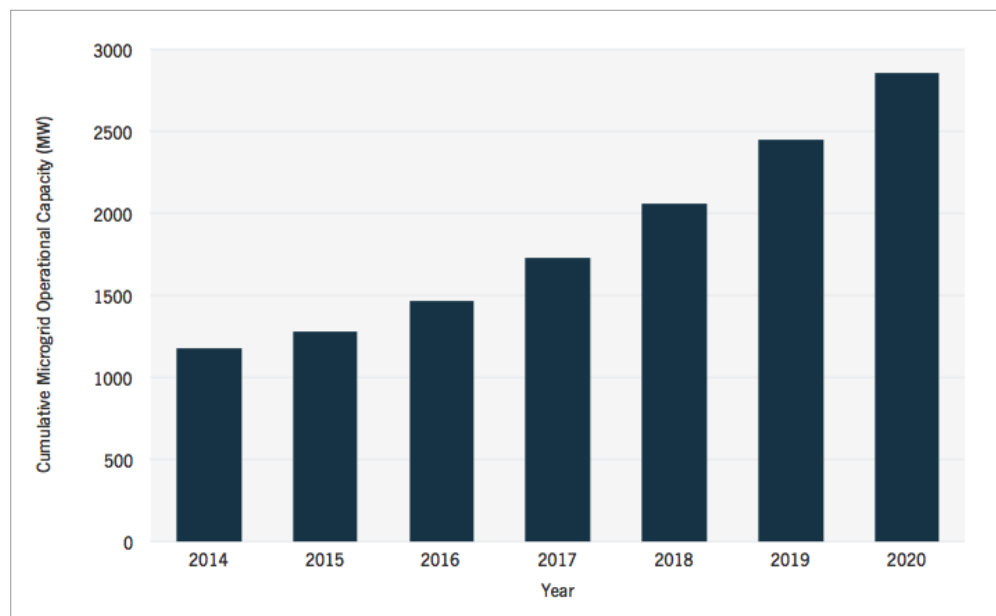
### Leading Seven States: Operational Microgrid Capacity

Source: GTM Research



### Cumulative Operational Microgrid Capacity, Base Case Forecast

Source: GTM Research



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