

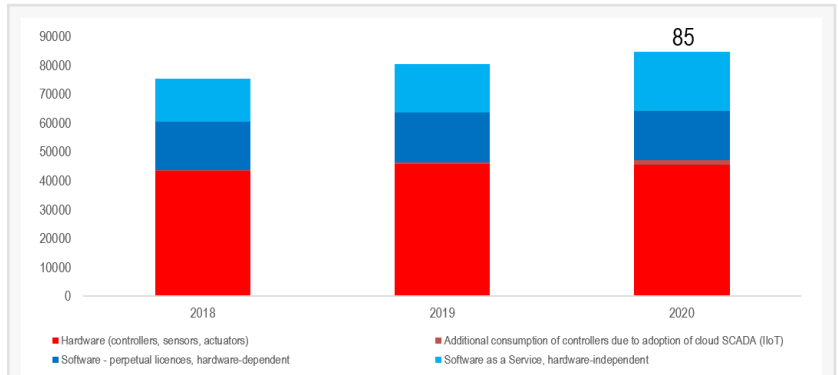
Global SCADA market has reached \$85 bln. in 2020 with 5% YoY growth and will reach \$173 bln. in 2025

J'son & Partners Consulting has completed the evaluation of the global SCADA and MES market. According to the results, it has reached \$85 bln. in 2020.

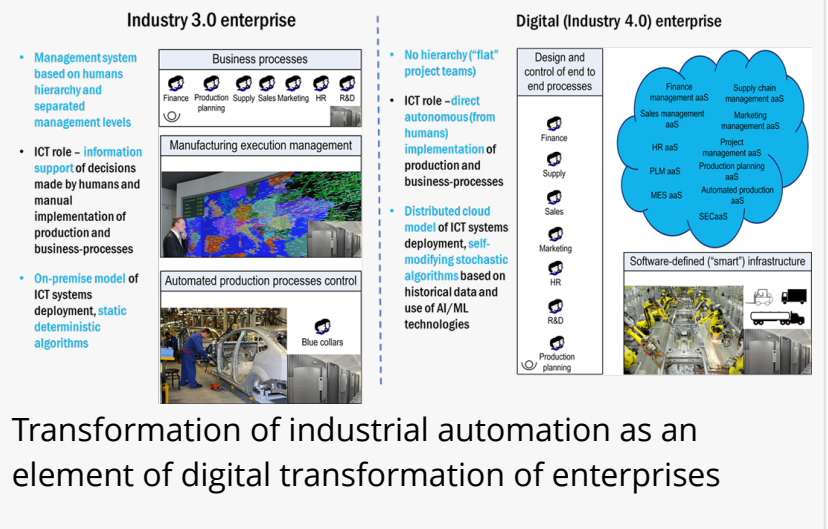
MOSCOW, RUSSIA, October 25, 2021 /EINPresswire.com/ -- J'son & Partners Consulting has completed the

evaluation and forecasting of traditional and cloud components of the global SCADA and MES market. According to the results, the market has reached \$85 bln. in 2020 with 5% YoY growth. It is expected that during the period of 2021-2025 the market will be growing faster – at 13% CAGR, while cloud SCADA growth will overpass those of traditional ones.

The growth is relatively weak because traditional and new segments of the market have quite different paces of growth: traditional segments are almost stagnating, while the cloud ones (IIoT) are quickly growing – refer to Fig. 1.



Volume, structure and dynamics of global SCADA market in 2018-2020, \$ bln.



Transformation of industrial ICT automation as an element of digital transformation of enterprises

Global SCADA and MES markets are to be transformed to a cloud model, and the innovations are aimed at the radical extension of functionality and role of these systems:

- Self-learning capabilities of SCADA and MES, i.e. transition from human-defined algorithms to flexible self-modified AI ones (Fig. 2).
- Autonomous multi-agent interaction, where each production or end-user asset acts as an independent autonomous agent overseen by cross-agent autonomous orchestration.

It will lead to a complete change of SCADA and MES architectures and their positioning in the structure of enterprise management systems. Digitalization asks for a flat (peer-to-peer) architecture with a flexible split of functionality, intensive information flows, and hardware-independent execution. The broad range of hardware-independent functionality shall be formed within ecosystems of IIoT-platforms and applications, in combination with high-level

automation. This range of functionality is to cover both the traditional part – visualization of production processes, and the digital one – digital twins and integrated models, self-learning closed-loop simulation, and autonomous stochastic planning.

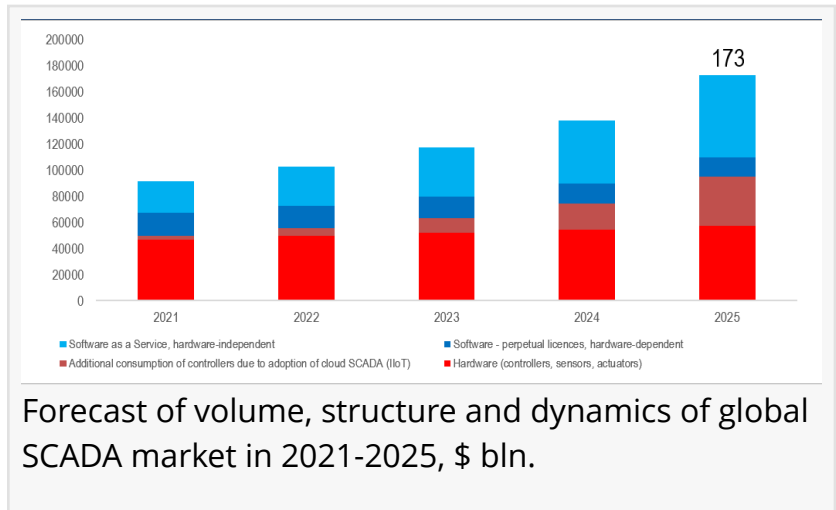
It means that cloud SCADA (IIoT) is a completely new market, aimed to replace the traditional one and extend its functional coverage to segments not yet covered by SCADA and MES. Therefore, the quick growth of this market will be provided by new functionality development, new segments coverage, and replacement of traditional SCADA in the sphere of M2M data visualization and deterministic planning automation.

In this regard, it should be noticed that at the first stage of development during the period of 2021-2025, this market will be growing mostly by developing a new segment of end-users assets automation, while a conservative existing segment of production assets automation will be less adoptive to the cloud concept.

The end-users assets automation segment is already larger than a production segment in terms of controllers consumption, but does not historically has a sophisticated automated management layer, so it is open to new players, including the largest spheres of controllers consumption – automotive transport and building engineering systems. Wider adoption of autonomous driving and the smart home concept will lead to exploding growth of cloud SCADA consumption.

The increase of cloud adoption in the production sphere will be driven by gradual replacement and upgrade of acting production assets with the smart ones. Another way is to offer digital twins and stochastic analytics as an addition to the functionality of traditional SCADA and MES – this step demand almost no CAPEX and intervention to production processes automation.

The next stage, expected in 2025-2030, is a full-scale implementation of all cloud functionality including autonomous peer-to-peer agent interaction and multi-agent orchestration.



According to the forecast by J'son & Partners Consulting, it is expected that the estimated global SCADA market will reach \$173 bln. in 2025, with the CAGR at 13% due to the rapid growth of the cloud SCADA – refer to Fig. 3.

The only decreasing segment is the software sold as perpetual licenses. This model will be replaced by the consumption-based and outcome-based model used in major cases of SCADA deployment, including hybrid ones. The cloud-based model of the SCADA market will grow with a 23% CAGR during the period of 2018-2025. The major part of consumption during this period will be formed by operation automation and end-use products maintenance.

J'son & Partners Consulting is using its own outcome-based methodology to estimate the target economic and technical parameters of industrial E2E slices. Visit [the website](#) for more details and calculations.

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