

Power and Utilities – Services and Solutions

Customer Information Systems (CIS)

A research report comparing provider strengths,
challenges, and competitive differentiators

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Energy transition and dynamic consumers are driving technology adoption.

In this post-pandemic era, power and utility companies face challenges related to increasing clean energy adoption (decarbonization), ensuring grid and service reliability and resiliency, improving infrastructure security and optimizing costs. They must adopt advanced technologies to improve information flow with customers and facilitate demand response, renewable integration and storage, distributed energy resource management (DERM), advanced metering infrastructure (AMI) and other programs that engage customers and improve grid operations.

ISG, as an advisor that has helped several of the world's leading utilities navigate their digital transformations, believes that to build a successful, competitive and future-proof utility requires a focus on strengthening the technical and digital foundation, transforming grid operations, continuously improving cybersecurity, digitally enabling the workforce and improving customer experience through digital channels. It sees the following trends in the global power and utilities industry:

Growing need for investments to modernize and expand electric utility infrastructure

The aging U.S. electric transmission and distribution (T&D) infrastructure needs to be significantly upgraded as the industry faces challenges around energy transition, electric vehicle (EV) adoption, sustainability and net-zero initiatives and

Distributed energy and the resulting disruption of energy production



changes in customer preferences and regulations. P&U companies are thus required to modernize the grid and make it “smarter,” and more reliable. This upgrade will be facilitated by new-age technologies, equipment and controls, helping companies manage power outages, reduce adverse weather impacts and restore service faster after outages. This will also help consumers better manage energy consumption and costs.

Greater mix of decarbonized energy sources

Utilities are moving rapidly to wind, solar and other green sources of energy while reducing or eliminating their dependence on coal and fossil fuels. In some countries, nuclear, a reliable non-carbon emitting source, is facing opposition. These changes are coupled with an increasing shift towards distributed energy and the

resulting disruption of energy production patterns it creates. Renewable energy is expected to generate 50 percent of global electricity by 2050. In addition, more than \$3.4 trillion will be invested in renewable technologies over the decade. The increasing reliance on renewables and the impacts of climate change are necessitating substantial investments in grid modernization programs.

Zero-carbon energy sources, resources and incentives driving innovation and choice

As the global move toward net zero gains momentum, utilities are at the forefront of change and the transition to green energy. With advances in digitalization, new revenue streams are opening beyond the traditional utilities value chain. Utilities should embrace these changes to survive and thrive against innovative, digital-native third-party providers.

Rise of decentralized energy distribution

The industry is undergoing a shift to an increasingly decentralized and real-time model due to the rise of energy storage, prosumers and electric vehicle (EVs) adoption. Moreover, decentralized assets and IoT allow the field to inform control systems. The decentralized energy distribution can be a win-win for all major stakeholders, providing benefits around increased reliability and price stability. It brings in smaller players and producers with assets around renewable energy sources, such as wind turbines or solar panels, into the wider system. Apart from the above benefits, the decentralized system can help optimize the maintenance cost of assets.

Aging workforce and need for digital workforce

The global power and utilities industry, including in North America, faces the

issue of an aging workforce and the need to attract/retain new talent. The average age of a utility worker in the U.S. is over 50, several years older than the U.S. national average. The industry's challenge in attracting talent and compete against large tech firms is overwhelming. It is also facing a major crunch in digital skills. There is a shortage of qualified talent for new jobs, many of which require competencies around AI, machine learning, robotics and advanced analytics. With the growing importance of digital technologies, the industry is rethinking its strategy for training and upskilling existing workers on emerging technologies and in accommodating flexible work environments.

Digital customer interactions and experience

Today's utility consumer expectations are heavily influenced by the level of service received from other industries such as



transportation and banking. Utilities must engage with the consumer across various platforms and channels (omnichannel). While voice still dominates the interaction, many are moving to chat and chat-bots, AI or smart speaker interaction (Alexa, Google). Thus, companies need to look at their IT systems that enable the customers' expectations of immediate communication/interaction. They should be able to modify the system functionality to fit new platforms and business models, allowing them to improve in this area. As one solution pathway, selective utilities are addressing customer relationship management (CRM) functionality apart from an overall customer information system (CIS) upgrade.

Digital technologies for enabling new business models

The industry's increasing "uberization" and distributed energy resources will make it imperative for utility companies

to use innovative operating models. Diversification into renewables to modernize and future-proof business will also drive companies to adopt new business models. New opportunities are fast emerging in areas such as EVs, renewable energy, storage and value-added services for prosumers. By 2026, oil and gas companies may play a larger role in the global renewable energy generation market, even as utility companies face the urgency to shift to a digital operating model. This is a significant change from their business point of view, and they need reliable partners to help them transition from projects-to-products, outputs-to-outcomes, waterfall-to-agile kinds models. There is an important element of change management involved, which requires bringing in an alignment between business and IT.

Move toward a more data-driven business

Utility companies are yet to realize the full potential of data. To achieve this, they should address issues around access to data, data insights, data governance and quality, and cross-functional analytics. The need to derive value out of data for asset maintenance, weather-related warnings, customer preference, etc. drives the adoption of cloud-based data and IoT platforms. This also requires a combination of PaaS, SaaS and home-grown solutions on top of the data to generate business outcomes, supplemented with more sophisticated IT and OT integration strategies. There is also a drive toward more open, non-proprietary solutions for device rollouts. Water utilities, for example, are showing a higher interest in cloud IoT-based smart meter rollouts.

Transition to cloud

Many industries are moving toward cloud-based solutions for key workloads, which can enable greater resiliency, faster innovation and better customer service. However, utilities run into unique challenges around adopting cloud-based solutions. For example, subscription costs from cloud service providers have traditionally been categorized as operations and maintenance (O&M) expenses, as opposed to on-premises software licenses and integration efforts, which can be capitalized. Innovative utility CIOs have been at the forefront of leveling the financial decisioning playing field between cloud and on-premise-based deployments. Providers should focus on helping utilities capitalize their cloud investments by creating transformational assets, comprising cloud subscriptions and transformation services supported by regulatory review and approval. CIOs should not wait on others to address this issue.



Focus on cybersecurity due to inter-dependency of physical and cyber infrastructure

The rise of intelligent grids brings higher vulnerability to cyber threats. Strategic and operational security in utilities is therefore of critical importance at an enterprise level. These companies should proactively run risk assessments, cybersecurity programs and share intelligence to prevent cyber and physical attacks on grids. There is a strong market trend to separately address cybersecurity when constructing managed service strategies.

Legislation and regulatory changes

Several U.S. state governments have unveiled clean-power targets, requiring potential shifts in the composition of power grids. Additional incentives to change was the passage of Infrastructure Investment and Jobs Act (IIJA), the

bipartisan infrastructure bill by the U.S. Congress, in the fourth quarter of 2021. In May, the Biden Administration launched the Interconnection Innovation e-Xchange (i2X) — a new partnership funded by the infrastructure law that brings together grid operators, utilities, state and tribal governments, clean energy developers, energy justice organizations and other stakeholders to connect more clean energy to the U.S. power grid. The partnership will potentially help reduce wait times for clean energy sources in interconnection queues and lower costs to connect to the grid.

Zero-carbon energy sources, resources and incentives driving innovation.



Provider Positioning

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	Intelligent Business Process Management Services (iBPMS)	Next-Gen IT Services	Grid Modernization	Enterprise Asset Management (EAM)	Customer Information Systems (CIS)
Accenture	Leader	Leader	Leader	Leader	Leader
Alorica	Leader	Not in	Not in	Not in	Leader
Atos	Not in	Product Challenger	Product Challenger	Product Challenger	Not in
Birlasoft	Not in	Contender	Not in	Contender	Not in
Capgemini	Product Challenger	Leader	Rising Star ★	Leader	Leader
CGI	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not in
Cigniti	Not in	Contender	Not in	Not in	Not in
Coforge	Contender	Rising Star ★	Not in	Contender	Contender
Cognizant	Leader	Leader	Product Challenger	Leader	Leader



Provider Positioning

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	Intelligent Business Process Management Services (iBPMS)	Next-Gen IT Services	Grid Modernization	Enterprise Asset Management (EAM)	Customer Information Systems (CIS)
Conduent	Contender	Not in	Not in	Not in	Not in
Deloitte	Not in	Product Challenger	Not in	Not in	Product Challenger
DXC Technology	Contender	Product Challenger	Not in	Contender	Contender
Enzen	Not in	Contender	Not in	Contender	Not in
EXL	Product Challenger	Not in	Not in	Not in	Contender
EY	Not in	Contender	Not in	Not in	Product Challenger
Genpact	Leader	Not in	Not in	Product Challenger	Not in
HCL	Product Challenger	Leader	Product Challenger	Leader	Leader
Hitachi Vantara	Product Challenger	Leader	Leader	Leader	Not in



Provider Positioning

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	Intelligent Business Process Management Services (iBPMS)	Next-Gen IT Services	Grid Modernization	Enterprise Asset Management (EAM)	Customer Information Systems (CIS)
IBM	Leader	Leader	Leader	Leader	Leader
Infosys	Leader	Leader	Leader	Leader	Leader
LTI	Not in	Rising Star ★	Contender	Product Challenger	Contender
Lumen	Not in	Contender	Not in	Contender	Not in
NTT DATA	Market Challenger	Product Challenger	Not in	Not in	Not in
Oracle	Not in	Not in	Not in	Product Challenger	Product Challenger
PwC	Not in	Not in	Not in	Contender	Product Challenger
SAP	Not in	Not in	Not in	Product Challenger	Product Challenger
Softtek	Not in	Product Challenger	Not in	Not in	Not in



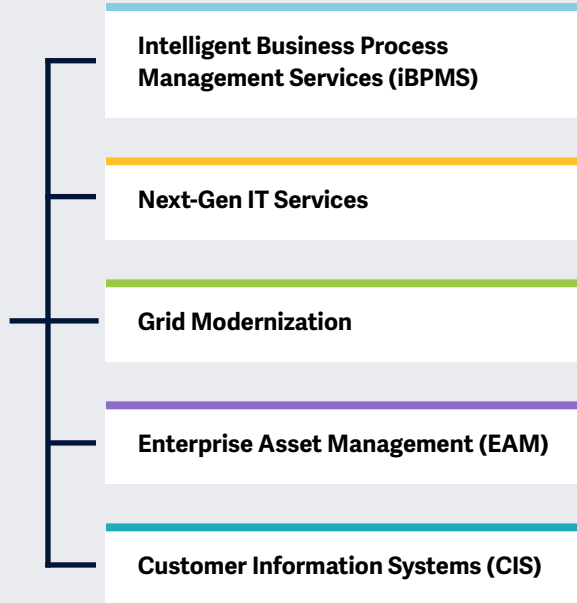
Provider Positioning

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	Intelligent Business Process Management Services (iBPMS)	Next-Gen IT Services	Grid Modernization	Enterprise Asset Management (EAM)	Customer Information Systems (CIS)
TCS	Leader	Leader	Leader	Leader	Leader
Tech Mahindra	Leader	Leader	Product Challenger	Product Challenger	Product Challenger
Teleperformance	Leader	Contender	Not in	Not in	Product Challenger
Wipro	Product Challenger	Leader	Leader	Leader	Leader
WNS	Product Challenger	Not in	Not in	Not in	Contender
Yash Technologies	Not in	Contender	Not in	Not in	Not in



This study focuses on what ISG perceives as most critical in 2022 for **power and utilities.**



Simplified Illustration Source: ISG 2022

Definition

The global power and utilities industry is in the middle of a massive paradigm shift. The industry is witnessing a steady increase in the demand for renewable energy sources and sustainability, driven by emerging technologies, government regulations, smart cities, electric mobility and increasing fossil fuel prices.

Utilities have been undergoing immense market variations over the past decade. The COVID-19 pandemic has caused disruptions across the industry value chain, forcing utilities to invest in new-age technologies. Irrespective of the nature of business (electricity, gas, water, energy or retail), they should develop intelligent solutions, improve operational efficiency, increase reliability and understand client challenges, while ensuring a safe and secure infrastructure for the environment and customers.

The path forward in 2022

Moving into 2022, the power and utilities industry needs to accelerate decarbonization, digitalization and decentralization, along with a further push for renewables penetration and integration. Utilities are seeking service providers that have deep industry expertise and digital technologies and innovation capabilities in areas such as business process management (BPM), IT services, enterprise asset management (EAM), customer information systems (CIS) and grid modernization.

The Power and Utilities – Services and Solutions study aims to understand key industry challenges and assesses service provider capabilities to address their unmet needs of enterprise clients.



Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following five quadrants on Intelligent Business Process Management Services (iBPMS), Next-Gen IT Services, Enterprise Asset Management (EAM), Grid Modernization, and Customer Information Systems (CIS) services/solutions.

This ISG Provider Lens™ study offers IT-decision makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- Focus on regional market

Our study serves as the basis for important decision-making in terms of positioning, key relationships, and go-to-market considerations. ISG advisors and

enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

The provider position reflects the suitability of IT service providers for a defined market segment (quadrant). Without further additions, the position applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their

focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between \$20 million and \$999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above \$1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product Challenger, Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens quadrant may include service providers that ISG believes have

strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

Number of providers in each quadrant: ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).





Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.





Customer Information Systems (CIS)

Customer Information Systems (CIS)

Who Should Read This

This report is relevant to enterprises in the power and utilities industry in North America for evaluating providers of customer information system (CIS) services.

In this quadrant report, ISG highlights the current market positioning of providers that offer CIS services to power and utilities companies in North America and how they address the key challenges faced in the region.

Like many other industries, power and utilities companies are also focusing on developing a customer-centric business strategy. As customer needs and expectations around resilience, security and flexibility are increasing, utilities are exploring new ways to redefine customer experience and transform their operating models and business processes to address regulatory, market and cost pressures.

There is a huge opportunity in using personalized data to improve customer engagement. Over the next few years, global utilities are expected to expand their investments in digital self-service, intelligent virtual agents, chatbots, robotic process automation, AI and customer experience analytics. Utilities in the U.S. are upgrading their customer management and billing capabilities by adopting CIS solutions from Salesforce, Oracle, SAP and other platform vendors. The adoption of SaaS-based CIS solutions enables utilities in the region to capitalize on their cloud investments by creating transformation assets. The service providers are helping clients in the power and utilities industry to move their IT infrastructure to the cloud and their customer experience systems to modern platforms such as SAP and Salesforce.



Chief information officers (CIOs) should read this report to better understand how the technology trends in the utilities value chain affect enterprises' existing use of legacy systems and the opportunities and potential limitations that may exist for adopting and integrating new capabilities.



Operations professionals should read this report to understand the relative positioning and capabilities of providers that offer end-to-end CIS services to deliver higher efficiency and effectiveness. The report also highlights their technical and integration capabilities, as well as their strategic partnerships.



Technology professionals should read this report to understand how CIS service providers are integrating multiple technologies into their proprietary offerings and compare their technical capabilities with the rest of the market.

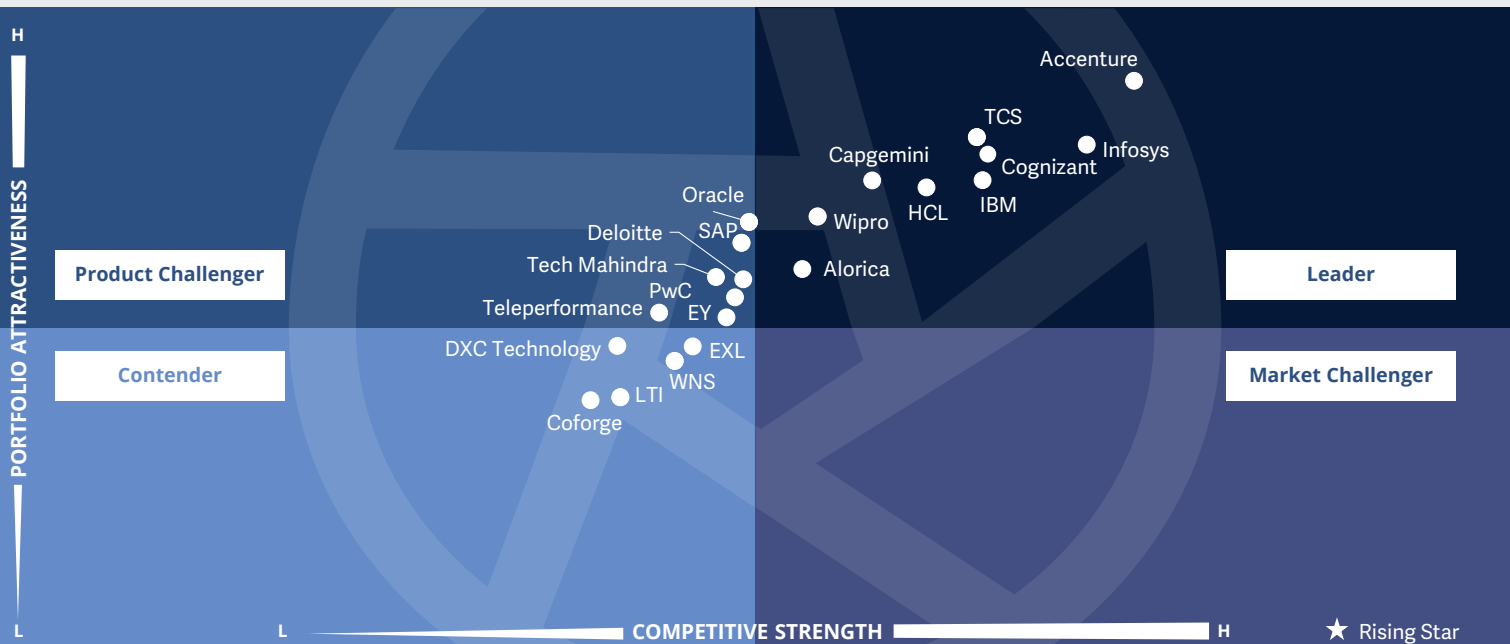


Customer experience professionals should read this report to better assess their utilities environment for opportunities to implement solutions and services to increase customer and staff experience and better strategize and invest in customer experience initiatives.



Power and Utilities – Services and Solutions
Customer Information Systems (CIS)

North America 2022



This quadrant assesses service providers that offer customer-centric solutions and offerings. With the changing customer profile, **a robust CIS will help utilities better manage customer interaction and relationships.**

Swadhin Pradhan

Notes:

SAP and Oracle related services are limited to their associated platforms. (When the software platform is Oracle/SAP, services can also be provided)
 EY and PwC considerations correlate to clients where existing and mature relationships exist.



Customer Information Systems (CIS)

Definition

This quadrant assesses service providers that offer CIS-related meter-to-cash (M2C), customer service and business process solutions in the power and utilities industry. These include account management, order processing, product management, rate design (handling complex rate structures), data management, billing, credit and collections, payment processing, contact services (call center), interactive voice response (IVR), consumer engagement, customer self-service and relationship management, enabling an enriched customer experience.

Eligibility Criteria

1. **Exposure of working in CIS** for power and utilities clients in the country or region
2. Should have at least three **successful CIS-related engagements**
3. Provide offerings and services in at least one of the following areas related to CIS:
 - * **Meter-to-cash**
 - Account management
 - Order processing
 - Product/service management
 - Rate design
 - Billing
 - Credit and collections
 - Accounts receivables
 - Statement preparation
 - Payment processing
- * **Customer service**
 - 24-by-7 contact/call centers
 - IVR services
 - Consumer engagement and self-service
 - Relationship management
4. Ability to **adapt to changes in compliance and regulations**
5. Expertise in the **application of next-gen technologies**, IoT, AI, cybersecurity and cloud
6. Demonstrate **strong partnerships** with industry associations, regulatory bodies, technology firms and startups specializing in power and utilities
7. Offer **referenceable case studies** for various services and solutions



Customer Information Systems (CIS)

Observations

The space is dominated by large providers and focused BPO players such as Alorica, Oracle and SAP. CIS solutions continue to be the most preferred product suite in North America's power and utilities industry.

Providers are also looking to players such as SEW, powercloud, Ensek, Nexant, Milestone and KloudGin to drive innovation and solution development in the CIS space. Large providers have many tools and accelerators in addition to the product solutions for adding value.

Key CIS solutions focus on customer-centric areas such as customer segmentation, customer self-service, omnichannel customer service, integrated customer communications, meter-to-cash and billing solutions.

From more than 35 companies assessed for this study, 21 have qualified for this quadrant with nine being Leaders.

accenture

Accenture has been delivering BPO/CIS services to utilities companies for more than 20 years across various regions. The company has strong partnership with SAP and Salesforce around various CIS solutions such as omnichannel digital customer experiences and sustainability solutions.

Alorica

Alorica has a portfolio of omnichannel solutions and uses data-driven intelligence to improve technology support outcomes. It has a large pool of at-home agents, which is a great value add for clients. It has developed PayNow, a platform that delivers payment processing solutions.

Capgemini

Capgemini has about three decades of experience in providing business services across various areas such as people, F&A and intelligent customer operations. The company continues to invest in tools, technologies and platforms to enhance customer business outcomes.

cognizant

Cognizant provides targeted CIS solutions for the power and utilities industry through UtlityOne Engage and UtilityOne Insights, an integrated customer experience solution. The company's industry solutions are plug-and-play accelerators and frameworks to accelerate the deployment time for personalized customer experience in utilities.

HCL

HCL, with its focus on providing digital solutions to clients, has a comprehensive CIS offering portfolio. These include solutions around billing and payments, chat service, digital marketing, virtual assistants and customer insights and analytics. It has dedicated CoEs for utilities in the U.S., the U.K., Ireland, the Philippines and India.

IBM

IBM's software portfolio helps customize CIS solutions for utilities. In terms of partnerships, the company implements products from SAP (legacy ISU and S4H for Utilities), Oracle CC&B and powercloud, among other companies. It also has proprietary solutions, tools and accelerators to further enhance CIS solutions for clients.



Customer Information Systems (CIS)



Infosys provides CIS solutions based on Oracle for utilities clients. It also offers Salesforce and Microsoft CRM solutions, which it continues to scale. It partners with tier-2 players such as SEW, powercloud, Ensek, Nexant, Milestone and KloudGin.



TCS provides innovative offerings in the North American utilities market with its AI-driven solutions; partnerships with SAP, Oracle and Salesforce; and utility industry-focused customer experience centers. To provide more value-added CIS solutions, it has established partnerships with companies such as SEW, Gentrack, powercloud, Ensek and Aptumo.



Wipro is focused on providing cloud-based CIS solutions and is working with many utilities to implement cloud-based CIS solutions such as Oracle Utilities Customer Cloud Service, powercloud and Salesforce. It is working with hyperscalers to create custom digital channels, data solutions and customer experience solutions for utilities.



Infosys



“Infosys has a strong set of CIS offerings driven by partner products and in-house accelerators.”

Swadhin Pradhan

Overview

Infosys is a technology company that offers consulting, IT and business process services. With 20 years of presence, Infosys BPM, the business process arm, has more than 52,000 professionals offering services to over 230 clients. Infosys' CIS services comprises of offering that leverages its knowledge-based AI platform and deep business, functional and technology knowledge to digitize contact centers, transform customer experience and modernize metering, billing and payment systems.

Strengths

Focused partnerships and investments: For CIS, Infosys has strategic partnerships with Oracle and SAP Utilities. It has dedicated investments and strategic initiatives on the next-gen SAP roadmap (S4 HANA and Industry Cloud). The company has completed more than 400 large Oracle engagements in over 40 countries. It also provides Salesforce and Microsoft CRM solutions, which it continues to scale. Other partners include EY, SEW, powercloud, Ensek, Kraken, Milestone and KloudGin.

Strong talent profile: Infosys' utility customer service practice has more than 3,500 experts serving over 30 clients. In addition, it has innovation labs in Redwood Shores, California, and Bangalore. As part of its SAP, Oracle and Salesforce practices, the company has more than 20,000, 17,000, and 5,000 consultants, respectively.

Continued focus on new age technologies and practice development: Infosys uses its industry expertise and focus on new-age technologies such as IoT, edge, analytics, AI and machine learning to provide digital solutions in the CIS space. For CIS, it has more than 100 tools and accelerators.

Caution

Infosys should further showcase its strength in the CIS space for power and utility clients by developing a joint go-to-market strategy with some of its biggest partners such as SAP, Oracle and Salesforce.





Appendix

The ISG Provider Lens 2022 – Power and Utilities – Services and Solutions analyzes the relevant software vendors/service providers in the North American market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Lead Author:

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The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of July 2022, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars (\$US) unless noted.

The study was divided into the following steps:

1. Definition of Power and Utilities – Services and Solutions market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG’s internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
 - * Strategy & vision
 - * Tech Innovation
 - * Brand awareness and presence in the market
 - * Sales and partner landscape
 - * Breadth and depth of portfolio of services offered
 - * CX and Recommendation



Author & Editor Biographies

Lead Analyst



Swadhin Pradhan
Senior Manager and Principal Analyst

Swadhin Pradhan brings more than 17 years of technology, business and market research experience and expertise to ISG clients. He has rich experience in executing market/competitive intelligence (MI/CI) and quasi-consulting projects in manufacturing, energy and resources industry.

Prior to ISG, Swadhin has worked with MI/CI and thought leadership organizations of large tech and consulting firms such as IBM and Deloitte. At ISG, He is focused on

ISG Provider Lens™. His research and analysis for ISG clients is focused on Energy and Utilities market development, disruption and change. He currently contributes to ISG's Provider Lens global research studies as a lead analyst.

Swadhin holds an MBA in Marketing and Finance from Institute for Integrated Learning in Management (IILM), New Delhi, and an engineering degree in Electronics and Telecom.

Research Specialist

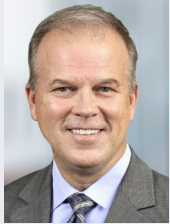


Sandhya Hari Navage
Research Specialist

Sandhya Navage is a research specialist at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on power and utilities services, insurance BPO and IT services, and payroll services. She supports the lead authors in the research process and authors the global summary report. She also develops content from an enterprise perspective and collaborates with advisors and enterprise clients on ad-hoc research assignments. She has been associated with ISG since 2021. Prior to this role,

she worked with IT/BPO and financial services companies and has more than twelve years of experience in market research. She has experience in creating actionable insights and value-added competitive analysis for multiple industries including insurance, banking, financial services, manufacturing and energy, and utilities.





IPL Product Owner

Jan Erik Aase
Partner and Global Head – ISG Provider Lens™

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.



*ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens research, please visit this [webpage](#).

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Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data. For more information, visit www.isg-one.com.





SEPTEMBER 2022

REPORT: POWER AND UTILITIES – SERVICES AND SOLUTIONS