ISG Provider Lens™

Power and Utilities – Services and Solutions

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

Customized report courtesy of:

Infosys®

QUADRANT REPORT | SEPTEMBER 2022 | NORTH AMERICA

Table of Contents

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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

Page 1 of 4

	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

Page 2 of 4

	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

Page 3 of 4

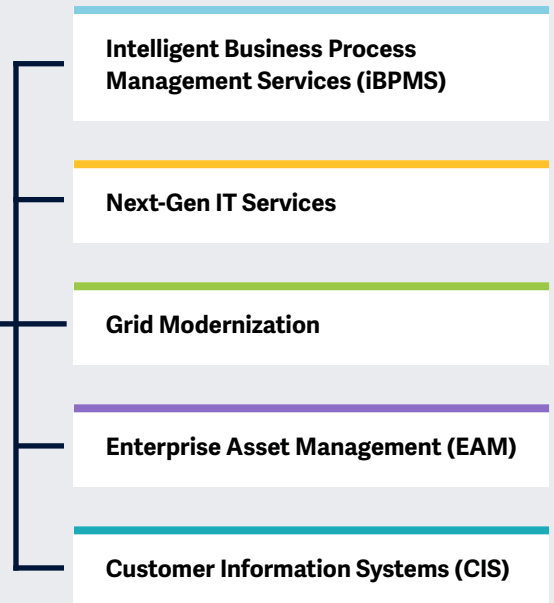
	Intelligent Business Process Management Services (iBPMS)	Next-Gen IT Services	Grid Modernization	Enterprise Asset Management (EAM)	Customer Information Systems (CIS)
IBM	Leader	Leader	Leader	Leader	Leader
Infosys	Leader	Leader	Leader	Leader	Leader
LTI	Not in	Rising Star ★	Contender	Product Challenger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

Page 4 of 4

	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.

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.

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.

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.

Intelligent Business Process Management Services (iBPMS)

Who Should Read This

This report is relevant to enterprises in the power and utilities industry in North America for evaluating providers of intelligent business process management services (iBPMS).

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

The major concerns among enterprises in the power and utilities industry are associated with reliability, quality of customer service and compliance. These challenges are further complicated by decentralized business units, siloed processes, shortages of a skilled workforce, higher operating expenses, and increased mergers and acquisitions.

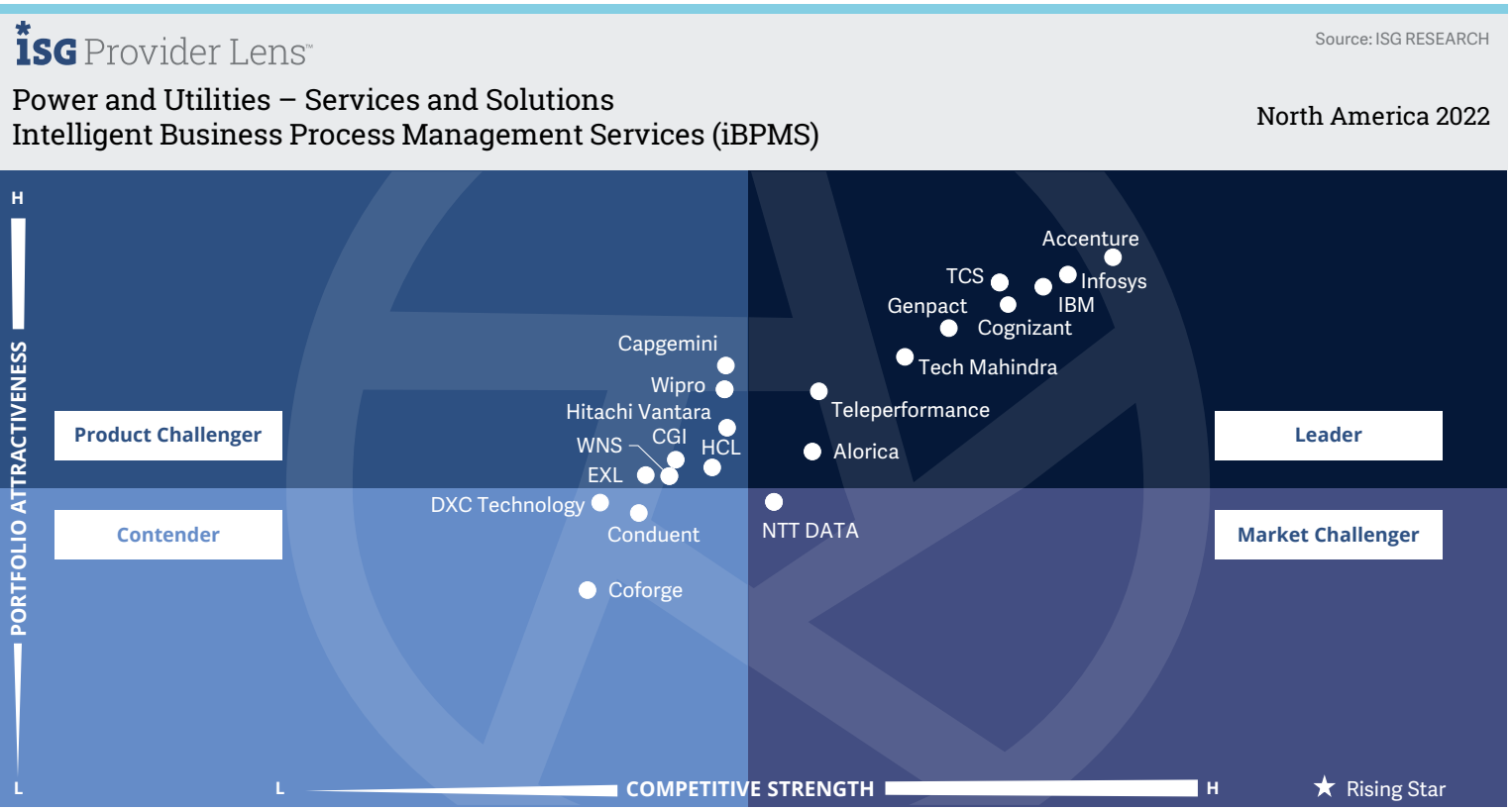
Since the COVID-19 pandemic, utilities have been realizing the importance of investing in intelligent automation initiatives to reap the benefits of cost reduction, increase customer satisfaction and generate new or incremental revenue. There has been significant progress in AI-driven transformation solutions. Service providers are continuously investing in these initiatives to provide an array of domain-specific digital tools such as bots, sensors, AI-powered assistants and mobile meter readings to address the inefficiencies in the system.

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.

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

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

Procurement professionals should read this report to understand the provider ecosystem for iBPMS solutions in North America and gain insights into how providers compare to one another.



The quadrant assesses service providers that offer business process outsourcing services in the power and utilities industry. These services enable companies to **improve efficiency, productivity and business processes for better decision making**.

Swadhin Pradhan

Definition

The quadrant assesses service providers that offer BPM services in the power and utilities space, driven by automation and analytics. These BPM services include customer services (front and back office and B2B/B2C), sourcing and procurement, human resources, finance and accounting (F&A), regulatory and compliance, knowledge services, master data management, field workforce services, network operations, maintenance, repair and operations (MRO), operational business intelligence (customer, marketing, and asset) and supply chain management service. These services enable companies to improve efficiency and productivity in daily operations and business processes (front/middle/back office) for an enriched customer experience and better decision making.

Eligibility Criteria

1. Ability to offer a combination (if not all) of the following **BPM services to power and utilities** companies across the value chain, with regional expertise:
   * F&A
   * Sourcing, procurement, and supply chain
   * Customer service
   * Human resources
   * Legal
   * Regulatory and compliance
   * Media and content management
   * Master data management
   * MRO
   * Field workforce services
   * Network operations
   * Analytics
2. Extensive **domain knowledge of the industry** and local regulatory and compliance requirements
3. Experience in **optimizing business processes** for clients in the power and utilities industry
4. Expertise in the **application of next-gen technologies** such as analytics, IoT, AI, cybersecurity, cloud and blockchain
5. Demonstrate **strong partnerships** with industry associations, regulatory bodies, technology firms and startups in the industry
6. Offer **referenceable case studies** for various services and solutions across the value chain

Observations

Most large IT players, Indian services companies and focused BPO players continue to dominate the space in the North American power and utilities industry.

The identified leaders in the iBPMS space have strong BPM capabilities drawn from their industry expertise. They focus on new-age technologies and constant innovation around technologies and solutions through partnerships and intellectual property.

These leaders continue to look at M&As and selective partnerships with niche players to provide and expand their BPM capabilities. Understanding the intersection between technology and business is considered a key capability that has helped them distinguish their services.

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

accenture

Accenture's strong industry focus and ability to maximize its capabilities across strategy, consulting, its Accenture Song program, operations and technology provide it with a competitive position in the power and utilities BPM services space. Its portfolio of services and solutions has helped optimize their operating and capital expenses.

Alorica

Alorica has a strong focus on the U.S. and offers a host of growth capacity services and business continuity solutions. Its services help clients optimize their business environments by providing self-service tools that reduce agent dependencies.

cognizant

Cognizant, with its strong position in the power and utilities industry and focus on automation, provides more than just traditional BPO services. Its industry solutions include plug-and-play accelerators and frameworks that help speed up the deployment time for personalized customer experience in utilities.

Genpact has further strengthened its position in the global BPO space across industries including P&U by building capabilities and solutions enhancements in areas such as AI, machine learning and data and analytics. The company has strong domain expertise owing to its GE legacy.

IBM

IBM, through its Intelligent Workflow concept, renewed focus on partnership-led go-to-market strategy and prowess in the technology and services space, continues to be dominant player in the power and utilities space. The company leverages IBM Research methods such as IBM Garage™ to drive digital transformation in the BPM segment.

Infosys

Infosys' business process arm, Infosys BPM, with its talent pool and technology focus, provides power and utilities companies with best-in-class BPM services. Its expansive delivery and offshore capability, along with utilities-focused centers of excellence, acts as a catalyst for clients to outsource key workflows.

TCS has a large presence in the North American utilities market and long-standing relationships with clients. The company's AI-driven solution technologies for utilities in the BPM space, partnership with SAP, utility industry focus and customer experience centers have helped it to maintain a competitive position in the North American market.

Tech Mahindra provides digital-led solutions for power and utilities industry clients. With its strong and growing utilities practice and focus on technology, the company helps utilities in their front-, middle- and back-office transformations.

Teleperformance

Teleperformance has considerable experience in the electric and gas utility space, having served more than 60 clients around the world. The company continues to invest in tools, technologies, and platforms to enhance customer business outcomes and help employees deliver exceptional services.

Leader

"Infosys' utility focused BPM solutions complements its cross industry digital solutions."

Swadhin Pradhan

Infosys

Overview

Infosys provides consulting, IT and BPO services. With 20 years of presence, Infosys BPM, the business process arm, has more than 52,000 professionals serving over 230 clients. The company has been strengthening its focus on the U.S., establishing innovation centers and utility centers of excellence (CoEs). It is continuing to expand its portfolio of clients in the BPM space. In North America, the utility sector delivered a consistent 25 percent YOY growth for the company over the last 10 years.

Strengths

Strong partner ecosystem: Infosys continues to strengthen its partner network in the BPM space. Partnerships with companies such as HighRadius, GE and Autodesk has helped it launch utility specific solutions around GIS, Intelligent I2C, MDM, etc. It has multiple academic collaborations with universities such as Cornell, Purdue and Stanford.

Strong offshore capability and delivery hubs: The company has 35 delivery locations spread across 14 countries. These centers help it provide BPM solutions in a cost-effective and timely manner. Apart from expanding its utilities presence in nearshore hubs such as Canada and Mexico, the company has opened utilities CoEs in Raleigh and Phoenix.

Continued focus on new-age technologies and practice development: With its expertise in infrastructure modernization solutions and new-age technologies, the company executes its strategy of providing digital solutions in the BPM space. It also leverages and continues to enhance its leadership in F&A. Infosys has over 16,000 finance professionals globally and one of the largest CoE in the industry.

Caution

Infosys continues to focus on transmission and distribution plus the retail segment of the value chain. It should look at other segments such as water and gas to expand its client base.

Next-Gen IT Services

Who Should Read This

This report is relevant to enterprises in the power and utilities industry in North America for evaluating providers of next-generation IT services.

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

Some of the challenges that power and utilities enterprises face include legacy infrastructure, increased complexity of technology, changing consumption patterns, growing demands and regulatory compliance. The unique interdependencies between physical and cyber infrastructure also create vulnerabilities, requiring sophisticated security measures. Utilities are adopting cloud technology for optimized IT infrastructure and exceptional computation power and are providing secured, accessible, affordable and reliable services. To analyze the complex and large set of data, the power and utilities industry heavily relies on technologies such as AI and machine learning, advanced analytics and IoT devices.

Utilities in North America are investing in security operations centers, advanced metering infrastructure (AMI) managed services, network operations centers services, meter data management, energy-efficient SaaS and outage management offerings. The utilities seek experienced service partners that can help them address the business challenges with proven solutions, allowing them to focus on their core business.

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.

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

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

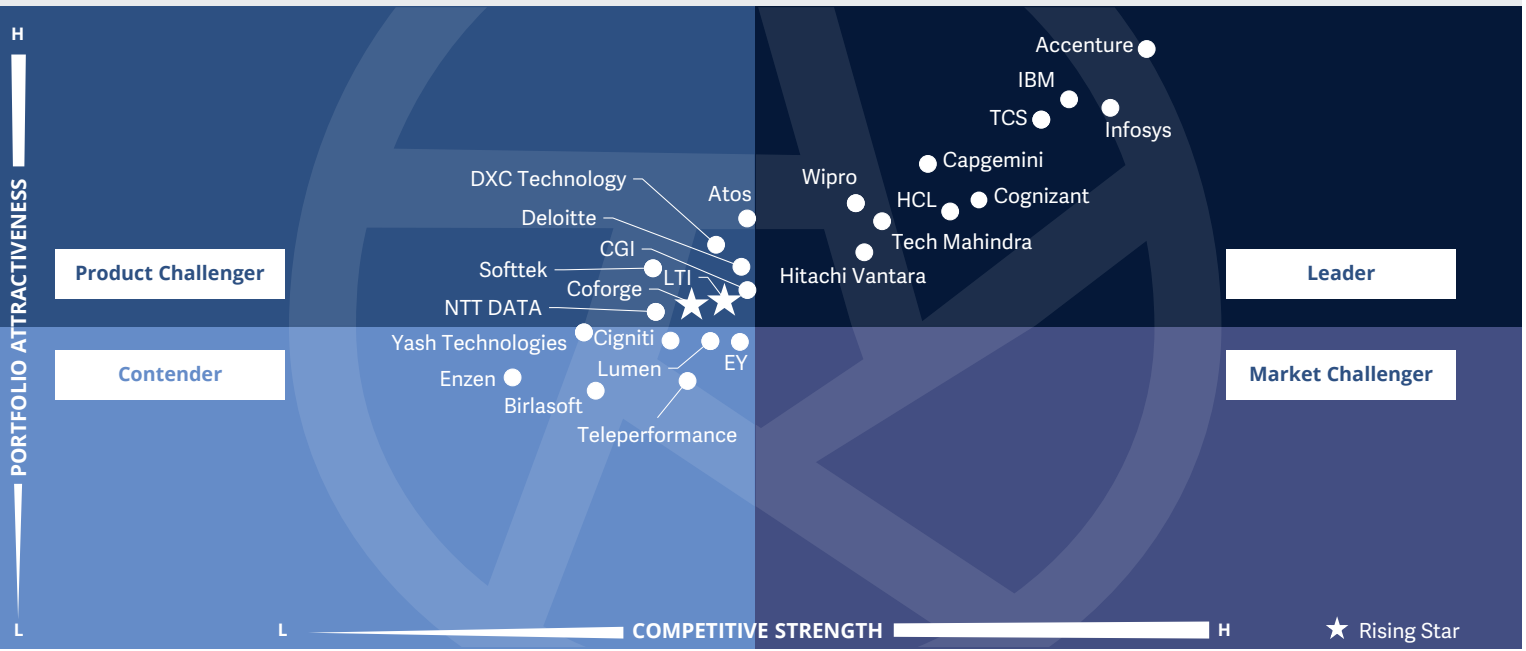
Cybersecurity professionals should read this report to see how service providers address the significant challenges of compliance and security while keeping the utilities' operations seamless.

ISG Provider Lens™

Source: ISG RESEARCH

Power and Utilities – Services and Solutions
Next-Gen IT Services

North America 2022



This quadrant assesses service providers that offer IT managed services. These providers enable utilities to **increase efficiency, ensure compliance, minimize costs, optimize assets and maximize customer satisfaction**.

Swadhin Pradhan

Definition

This quadrant assesses service providers that offer IT managed services in the power and utilities industry. The services include application development and maintenance (ADM), infrastructure services (data center, cloud, network, workplace, and cybersecurity) and systems integration (such as new application development) across the value chain.

Eligibility Criteria

1. Ability to offer a combination (if not all) of the following **IT services to companies in the power and utilities** space across the industry value chain, with local expertise in the assessed region or country as follows:
   * Systems integration
   * ADM
   * Infrastructure services (data center, network operations, cloud, etc.)
   * Cybersecurity solutions
   * Next-generation technologies such as automation, analytics, AI/machine learning, IoT and blockchain
2. Showcase **extensive domain knowledge** of the power and utilities industry and local/regional regulatory and compliance requirements
3. Demonstrate **strong partnerships** with industry associations, regulatory bodies, technology firms and startups specializing in this industry
4. Experience in **large transition projects** that include post-merger integration, IT-driven business transformation, cybersecurity and modernization of legacy systems and applications
5. Offer **referenceable case studies** for services and solutions across the value chain

Observations

Most large IT players such as Accenture, IBM, Infosys and TCS continue to dominate the space in the North American power and utilities industry. However, Rising Stars such as Coforge and LTI are building capabilities and are competing with large players across the value chain.

The identified leaders in the next-gen IT services space are building on their strong IT services capabilities. Key differentiators for some of these players include industry expertise, focus on reskilling and upgrading the talent pool, co-creation of solutions with partners and the ability to expand offshore and nearshore delivery capabilities. Many companies are leveraging AI or machine learning to upgrade their delivery models. Companies such as Capgemini and HCL are using their large engineering capabilities and professionals to drive value proposition and digital transformation for clients in this industry.

In addition, leaders continue to look at M&As and selective partnerships with niche players to provide and expand their utility specific capabilities. IT/OT integration is an area where almost all players with a manufacturing or industrial focus are building capabilities together with large OT players such as Siemens, ABB and Dassault Systems.

From more than 35 companies assessed for this study, 24 have qualified for this quadrant with 10 being Leaders and two as Rising Stars.

accenture

Accenture's portfolio of technology services and solutions such as intelligent platform services, intelligent software engineering services, security, intelligent cloud and infrastructure gives it the capability to provide end-to-end solutions to clients across industries, including power and utilities.

Capgemini

Capgemini has built a strong engineering capability though its Altran acquisition, which helps it provide digital transformation solutions to companies across industries including the power and utilities industry. The company's ADMnext is a full-stack transformation approach focused on sustained business improvement in the digital age.

cognizant

Cognizant, with its strong position in the power and utilities industry, provides solutions and services through a consultative mindset that leverages its deep industry domain expertise and collaborations. The company is actively engaged in M&As and partnerships to focus on cloud, IoT, data and digital engineering.

HCL

HCL provides digital-led solutions that leverage its strong engineering capabilities for power and utilities clients. To expand its capabilities, the company has made strategic acquisitions such as C3i, PowerObjects and Strong Bridge Envision. It also works with innovative global startups that focus on various areas related to power and utilities.

Hitachi Vantara

Hitachi Vantara, through its Hitachi parent company, has considerable experience in providing services and solutions for clients in the power and utilities industry. It is an engineering-oriented problem solver with strong capabilities in areas such IoT and data modernization.

IBM

IBM offers a strong hybrid cloud and AI strategy underpinned by Red Hat. The company has doubled down on its partner strategy and is expanding its client base, providing end-to-end services across industries including power and utilities. It continues to leverage IBM Research to showcase leading edge technologies such as 5G, blockchain and quantum.

Infosys

Infosys is a leading provider in the power and utilities space, holding long-standing relationships with many clients. It has been strengthening its relationship with key clients by investing in innovation hubs and CoEs in the U.S. Infosys is also building an ecosystem of partners comprising enterprise platforms, hyperscalers and leading universities.

TCS

TCS has set up innovation centers and invested in intellectual property/platform-based offerings for the power and utilities industry in North America. It has also been strengthening its core delivery capability through a set of initiatives such TCS MFDM™, the delivery model for the Machine First approach, and TCS Cognix™.

Tech Mahindra

Tech Mahindra is focused on providing digital-led solutions for power and utilities clients. Its utility industry solutions are under the following platforms: CXRise, UtilityRise, AssetRise and TechMNxt. Through its patents, the company is focused on sustainability and net-zero initiatives for energy and utility companies.

Wipro

Wipro has a large utility industry practice with more than 13,000 professionals. It has a strong focus on digital transformation, with specialists working on its Utilities of the Future initiative. The company has designed and executed the Digital Transformation Leader program for digital enablement of talent across utility accounts.

Coforge

Coforge (Rising Star) has strong capabilities in the IT services space for the energy and utilities industry, working with some of the top companies in this space. It has strong portfolio of SAP and Pega solutions and accelerators to provide an array of services.

LTI

Let's Solve

Rising Star **LTI's** utilities business is one of its fastest-growing verticals. The company has reorganized its utilities business to strengthen its commitment and drive the business through partnerships and internal capabilities.

Leader

"Infosys delivers tangible outcomes for business and IT initiatives across the utilities value chain."

Swadhin Pradhan

Infosys

Overview

Infosys is a leading multinational technology company that offers consulting, IT and business process services. The power and utilities segment falls under the company's SURE (services, utilities, resources and energy) segment. In North America, the utilities sector delivered a consistent 25 percent YoY growth rate over the last 10 years. Live Enterprise Application Management Platform (LEAP), Infosys Cobalt, Polycloud platform and Infosys Information Grid help clients leverage its IT services.

Strengths

Developing nearshore capabilities through CoEs: Infosys is expanding its IT services for utilities through CoEs in Mexico and Canada. The company is increasing its headcount for utilities in U.S. innovation hubs by setting up these CoEs. Additional centers are in Raleigh, North Carolina. and Phoenix, Arizona. The company has 35 delivery locations in 14 countries.

Focus on AI/machine learning and other new-age technologies: Infosys helps utilities accelerate the application development lifecycle through automation, intellectual property, open source, and licensed third-party tools. Its next-gen IT services leverage AI and machine learning together with the organization's deep knowledge to drive automation and innovation. Infosys' proprietary blockchain platform enables peer-to-peer transactions.

Strong partner ecosystem: Infosys has a robust partner ecosystem in the utilities market, comprising enterprise platforms (Oracle, SAP, Maximo®) and hyperscalers (AWS, Microsoft, Google, IBM). It has multiple academic collaborations with universities such as Cornell, Purdue and Stanford. It also has a cybersecurity training partnership with Purdue.

Caution

Infosys should aggressively pursue deals in North America to cover major parts of the utilities value chain. It should leverage its relationships to cross sell and up sell.

Grid Modernization

Who Should Read This

This report is relevant to enterprises in the power and utilities industry in North America for evaluating providers of grid modernization services.

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

The increasing shift toward distributed energy resources and renewable energy is disrupting electricity consumption patterns. In addition, power and utilities companies are facing challenges related to climate change, aging infrastructure, power outages, growing electric vehicle (EV) adoption, data management and cybersecurity.

To overcome these challenges, the utilities in North America are ramping up investments in technology innovations such as smart meters, IT-OT integrations, grid management systems, including distribution management systems (DMS) and outage management systems (OMS), asset-management platforms and geospatial information systems (GIS). The focus on such technologies can help companies improve security, reduce peak loads, save operational costs and achieve better integration of renewables. The service providers are also innovating on new areas of grid transformation for better grid reliability and resilience.

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.

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

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

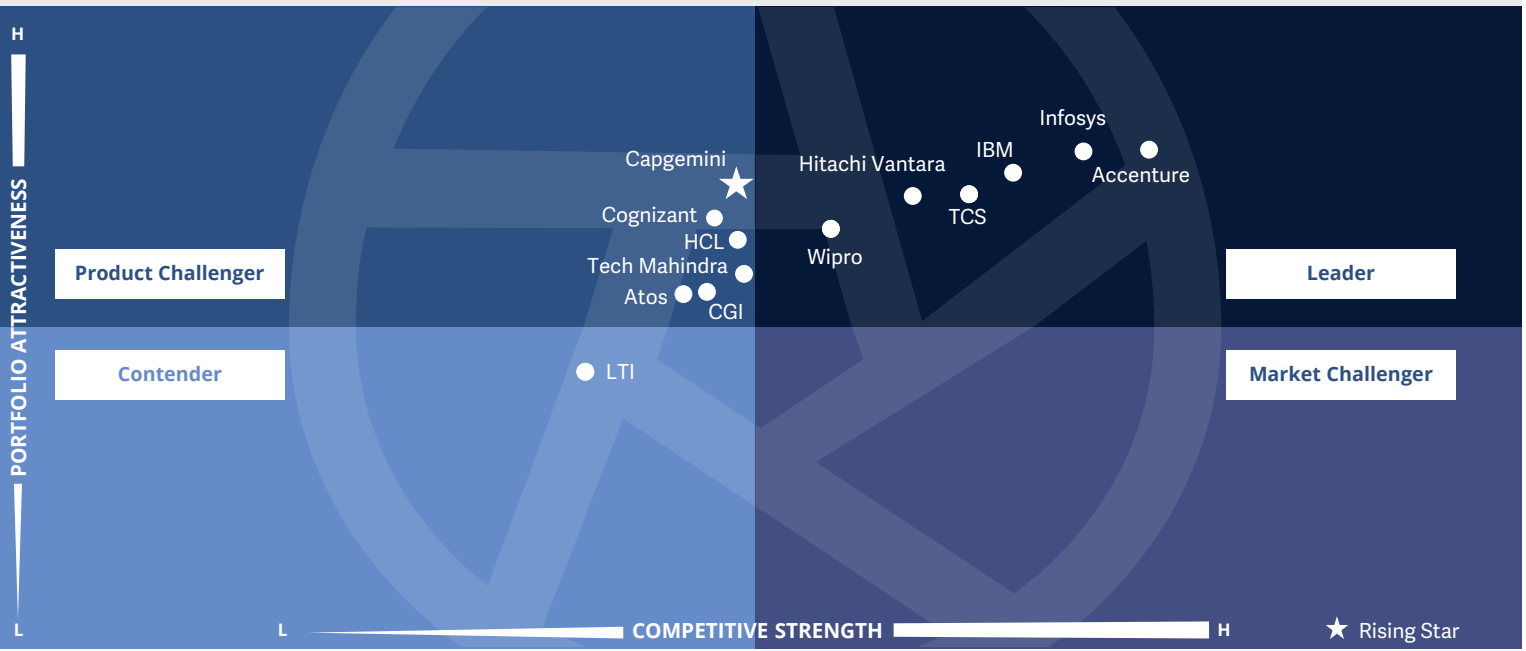
Procurement professionals should read this report to understand the provider ecosystem for grid modernization solutions and services in North America and gain insights into how providers compare to one another.

ISG Provider Lens™

Source: ISG RESEARCH

Power and Utilities – Services and Solutions
Grid Modernization

North America 2022



This quadrant assesses service providers that offer grid modernization and related services in the power and utilities sector. T&D companies are looking to **increase reliability of their grids through technology adoption.**

Swadhin Pradhan

Definition

Grid modernization and related services in the P&U industry include grid modeling, distributed energy resources management systems (DERMS), advanced distribution management systems (ADMS), geographic information systems (GIS), volt-var optimization (VVO), distribution and operations, scheduling and dispatch, grid resilience, demand planning and forecasting, response design, and integration. These services lead to an improved, reliable, and optimized grid infrastructure. With energy transition and EV adoption taking centerstage, grids should be modernized to provide a reliable service to customers.

Eligibility Criteria

1. **Exposure of working in grid modernization** and related services for clients in the power and utilities industry in the country or region Should have at least three **successful grid modernization-related engagements**
2. Provide offerings and services in more than one of the following areas:
   * Grid modeling
   * Grid management
   * Grid optimization and resilience
   * Demand planning, forecasting and outage management
   * Distributed energy resources (DER) technology selection, strategy and roadmap
   * DERMS
   * EV charging integration
   * ADMS
   * GIS
   * VVO
   * Advanced metering and smart grid services
   * Distribution automation services
3. Expertise in the **application of next-gen technologies,** including analytics, IoT, AI, cybersecurity, cloud and blockchain
4. Demonstrate **strong partnerships** with industry associations, regulatory bodies, technology firms and startups
5. Offer **referenceable case studies** for various services and solutions

Observations

Grid modernization, being a highly specific and niche capability, is dominated by large IT players with a strong technology and engineering background.

With a growing focus on EV, DER and sustainability/net zero, most leaders are actively engaged in M&As and selective partnerships with niche players to provide and expand their capabilities.

Providers and seeking to complement their grid mod offerings by providing horizontal digital service offerings on advanced analytics, AI and automation, RPA, and the cloud. The need for developing OT capabilities is driving IT companies to forge partnerships with large OT players such as Schneider, Infor, ABB and Bentley.

From more than 35 companies assessed for this study, 15 have qualified for this quadrant with seven being Leaders.

Accenture has strong industry and functional expertise and leverages the One Accenture strategy with industry talent to provide best-in-class utilities consulting services. The company has made strategic acquisitions and investments to expand its capabilities in the grid modernization space.

Capgemini leverages its partnerships to provide end-to-end business transformation solutions for facilitating the smart grid journey of clients. The company benefits from its strong engineering, digital innovation and consulting capabilities.

Hitachi Vantara

Hitachi Vantara's grid modernization services and solutions are part of its overall digital strategy. The company leverages its relationship with Hitachi Energy and Lumada to gain capabilities in grid modernization.

IBM

IBM's grid modernization solutions focus on energy transition and DERMS, among other utilities-related areas. It is co-developing solutions with key industry players to provide end-to-end solutions. The company also leverages its own suite of products such as TRIRIGA® and Maximo® to provide grid modernization solutions.

Infosys is focused on areas such as EV, DER, and sustainability/net zero. It complements its grid modernization solutions by providing horizontal digital service offerings focused on advanced analytics, AI, RPA, and the cloud.

TCS leverages its competitive position in North America to push grid modernization services. The company plans to create more intellectual property-based solutions on digital twins and partners with leading vendors to create joint go-to-market strategies.

Wipro has decades of experience in working with global utilities across OT platforms and IT integration. It offers considerable expertise in various products focused on grid modernization. It has a strong M&A strategy to expand its capabilities and solutions portfolio in areas such as smart grid communication solutions and cybersecurity.

Leader

"Infosys develops grid modernization solutions by aligning to new trends in the industry."

Swadhin Pradhan

Infosys

Overview

Infosys, headquartered in Bangalore, offers consulting, IT and business process services. The company's utilities practice spans across electric, gas and water. For grid modernization solutions, it brings together the best of its product, platform and services capabilities. Infosys NextGen Grid helps accelerate DER/EV integration, which is a major area of focus for the industry.

Strengths

Focus on key industry trends: Infosys aligns itself to key industry trends such as DER, EV and sustainability, which are shaping the future of the power and utilities industry. For example, its energy as a service digital platform with BP helps enterprise clients meet their sustainability and net zero goals.

Expansive grid modernization solution portfolio: The Infosys' grid mod practice provides solutions around grid modelling and planning, grid management and operations, grid analytics, and grid optimization. In addition, it complements its grid mod offerings by providing horizontal digital service offerings focused on analytics, AI, RPA, and the cloud.

Co-developing with partner ecosystem: Infosys works with its partner ecosystem to develop grid modernization solutions. For example, it is co-developing solutions with grid modelling partners on DER integration and EV on-boarding. Its grid analytics partners assist with solar disaggregation and visualization. The collaboration with the Stanford Bits and Watts program is on grid modernization.

Caution

Infosys should continue to offer its grid modernization solutions by leveraging its solid ecosystem of alliances and partners in the utilities space. This includes companies such as AutoGrid, GE, Nexant, ABB, Schneider, OSIsoft, SAP and IBM, and hyperscalers, namely AWS, Azure and GCP.

Enterprise Asset Management (EAM)

Who Should Read This

This report is relevant to enterprises in the power and utilities industry in North America for evaluating providers of enterprise asset management (EAM) services.

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

The power and utilities industry is currently undergoing a massive transformation in terms of operation, management of its assets and related regulations. Demand for clean energy, aging assets, the complexity of assets, regulatory compliance and growing cyber threats are some of the challenges faced by the industry. In addition, physical distancing measures, talent shortages (due to large-scale layoffs), supply chain disruptions and remote asset maintenance, due to the COVID-19 pandemic, have disrupted the field service operations and increased the need for assets management.

To address these challenges, utilities in the U.S. are adopting cloud-based EAM solutions, IoT devices, integration of drones and AI-based asset management to boost operational efficiencies, save costs, increase asset life expectancy, improve reliability and enhance safety. Utilities are digitizing field service management to improve decision-making and predict potential issues. Service providers are helping the utilities move their asset management systems to IoT and drone-enabled solutions and leverage new technologies such as digital twins and AR/VR for asset inspection and repair. Field service management is also gaining attention.

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.

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

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

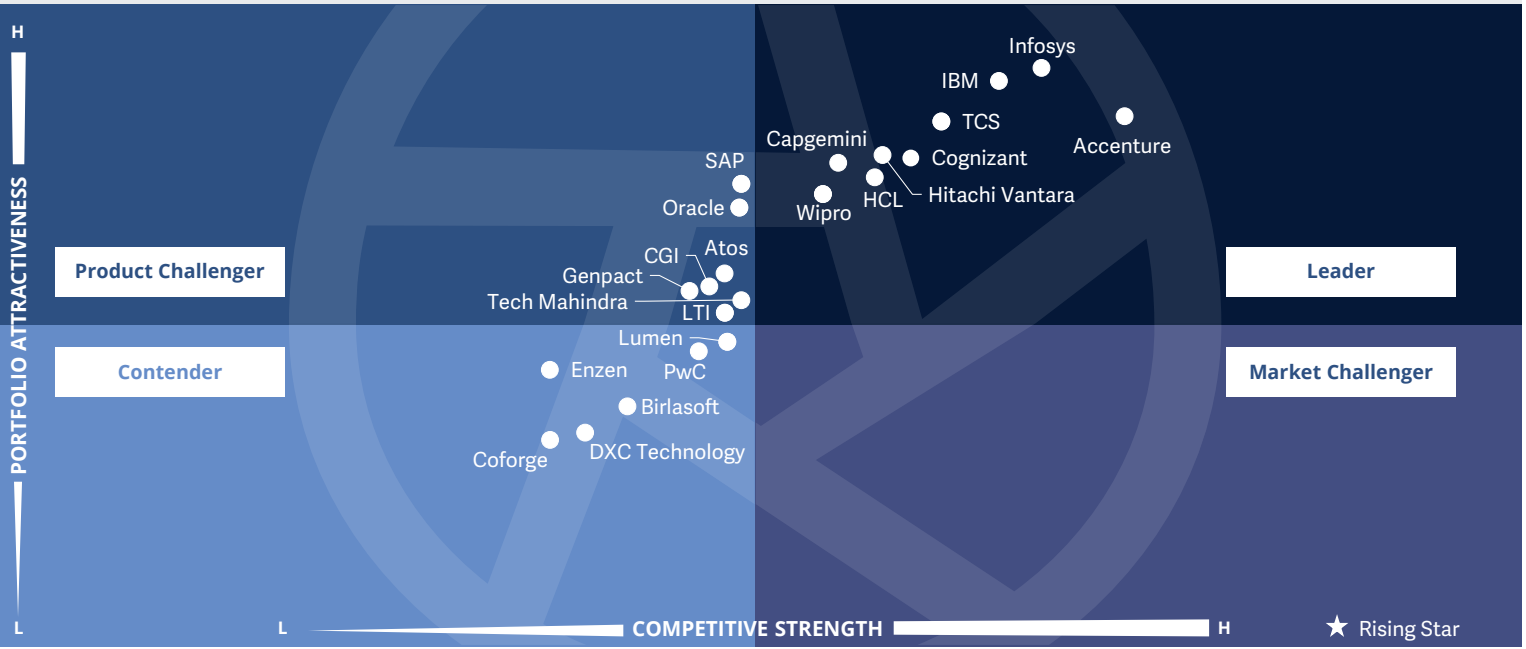
Procurement professionals should read this report to understand the provider ecosystem for EAM solutions and services in North America and gain insights into how providers compare to one another.

ISG Provider Lens™

Source: ISG RESEARCH

Power and Utilities – Services and Solutions
Enterprise Asset Management (EAM)

North America 2022



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

This quadrant assesses service providers that help companies manage assets. An effective EAM strategy and the right solution will help utilities **increase the reliability and optimization of aging infrastructure** including transmission and distribution (T&D) assets.

Swadhin Pradhan

Definition

This quadrant assesses service providers offering EAM services and solutions to clients in the power and utilities space. The services include asset lifecycle management, maintenance, repair and operations, labor management, controls management, application maintenance and support. Services also include supply chain solutions, cloud services, asset health management, digital enablement service and remote monitoring. They enable companies to increase asset performance, extend useful life and reduce operational costs.

Eligibility Criteria

1. Exposure of **working in EAM for power and utilities** clients in the region
2. Should have **successful EAM-related engagements** (past or present) with at least three companies
3. Provide offerings in at least one of the following areas related to EAM:
   * Asset health management
   * Failure prediction
   * Work and labor management
   * Supply chain transformation
   * MRO management
   * Computerized maintenance management system (CMMS)
   * Controls management
   * Warranty management
   * Geographic information system (GIS)
   * Digital EAM solutions (AI- and machine learning-based)
   * Analytics and reporting
4. Expertise in the **application of next-generation technologies**, including automation, analytics, IoT, AI, cybersecurity solutions, cloud and blockchain among others, for client engagements
5. Demonstrate **strong partnerships** with industry associations, regulatory bodies, technology firms and startups specializing in this industry
6. Offer **referenceable case studies** for various services and solutions across the value chain

Observations

Most large IT players such as Accenture and IBM as well as Indian services companies dominate the power and utilities industry in North America.

The IBM Maximo suite of solutions is one of the leading products that almost all Leaders and most providers provide to clients in asset-intensive industries such as power and utilities. The companies exhibit strong EAM capabilities drawn from their industry expertise, focus on new-age technologies and engineering, and solutions through partnerships and own intellectual property.

Leaders continue to look at M&As and selective partnership with niche players to provide and expand their EAM capabilities. Leading vendors also leverage their capabilities across various industries and technology domains to innovate and improve EAM solutions.

Providers have proprietary platforms and products that use technologies such as digital twins, AR, VR, mixed reality (MR) and 3D technology in the asset management space. Field service management is an area where many are seeking to expand and add capabilities.

From more than 35 companies assessed for this study, 22 have qualified for this quadrant with nine being Leaders.

accenture

Accenture has a strong portfolio of services and technological capabilities In the EAM space. It leverages third-party integration around products such as Maximo to provide intelligent asset management solutions. Its asset management services and solutions are provided through its Industry X digital offering, engineering and manufacturing operations.

Capgemini

Capgemini leverages its utilities industry platform, research, vendor partnerships, advanced analytics and Industry 4.0 strengths to drive industry specific EAM solutions. It also has proprietary platforms and products around new technologies such as digital twins, AR/VR/MR and 3D technology in the EAM space.

cognizant

Cognizant provides EAM solutions and services to clients through partner products (IBM Maximo and OSIsoft) and IT/OT players (Aveva and Schneider). It has implemented EAM solutions such as Salesforce Field Service Lightning Platform and developed a common platform of assets and work with power and utilities clients.

HCL

HCL has extensive experience in asset management consulting and industry and domain expertise, with a focus on delivering IBM Maximo solutions across industries. The company has a long-standing relationship with IBM and provides Maximo upgrade services to clients across asset-intensive industries including power and utilities.

Hitachi Vantara

Hitachi Vantara uses its extensive experience of serving the power and utilities industry through its parent, Hitachi, to provide enterprise/asset performance and field force/works management solutions. Its Lumada suite is a portfolio of business applications for asset-intensive industries.

IBM

IBM's EAM solutions are focused on its Maximo Application Suite, which offers a single platform for intelligent asset management, monitoring, maintenance, computer vision, safety and reliability. For the power and utilities industry, it brings in asset performance management (APM) and asset investment planning solutions together with Maximo. IBM has also integrated Red Hat's OpenShift container platform to Maximo.

Infosys' EAM practice combines utility industry domain expertise, best practices and products to drive asset management digital transformation. Its core predictive asset maintenance AI framework for utilities, called KRTI 4.0, and the Infosys XR platform are some of the key components of its EAM offerings for power and utility clients.

TCS plans to expand its EAM service and solutions portfolio through partnerships. Some of them include IBM, SAP, Infor - Hexagon, Salesforce, IFS, ESRI, GE, Oracle for Work. It offers asset management and field services. It plans to expand asset management services in North America through analyst and partner outreach.

Wipro is focused on expanding its EAM services and solutions through acquisitions such as Rizing. It is also engaged in joint intellectual property creation with IBM, a key EAM vendor, to create solutions for the water segment. The company has a strong pool of EAM consultants, specialists and digital transformation leaders.

Leader

"Infosys is focused on providing EAM solutions with a digital and cloud-first strategy."

Swadhin Pradhan

Infosys

Overview

Infosys offers consulting, IT and business process services. The power and utilities segment is under the company's SURE (services, utilities, resources and energy) segment. The company's utilities practice spans across electric, gas and water. The Infosys EAM practice combines utilities domain expertise, industry best practices and knowledge of leading products to drive digital transformation. Monitoring of asset health is part of Infosys Connected Operations on Cloud solution suite.

Strengths

Focus on talent: Infosys' EAM practice and has more than 2,000 experts dedicated to utilities. It also leverages a wider consulting and execution team comprising domain, process and technology experts to differentiate its offerings. It uses a localization and global talent strategy to hire local talent for serving clients globally.

Building DEO to drive EAM: The Digital Energy Orchestrator (DEO) provides a 360-degree approach to the digital EAM solution. Infosys has invested in KRTI 4.0, a core predictive asset maintenance AI framework for utilities, in partnership with Pöyry.

Other solutions such as the Infosys XR platform enables enterprises to create AR experiences for improving field service operations. Their diversified portfolio includes Mobile Field Services Management and GIS relevant to EAM.

Wide partner ecosystem: Infosys' works with its partner ecosystem on horizontal solutions for innovative platforms such as Bidgely and Nexant Energy. It also works with infrastructure OEMs (ABB and Schneider) and hyperscalers (AWS and Azure) for cloud infrastructure.

Caution

Infosys partners with vendors such as IBM, SAP, Oracle and niche product vendors like Whatfix, Celonis and Vantiq to provide EAM solutions. It should continue to collaborate with product OEMs and vendors to build and expand these solutions.

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.

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.

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.

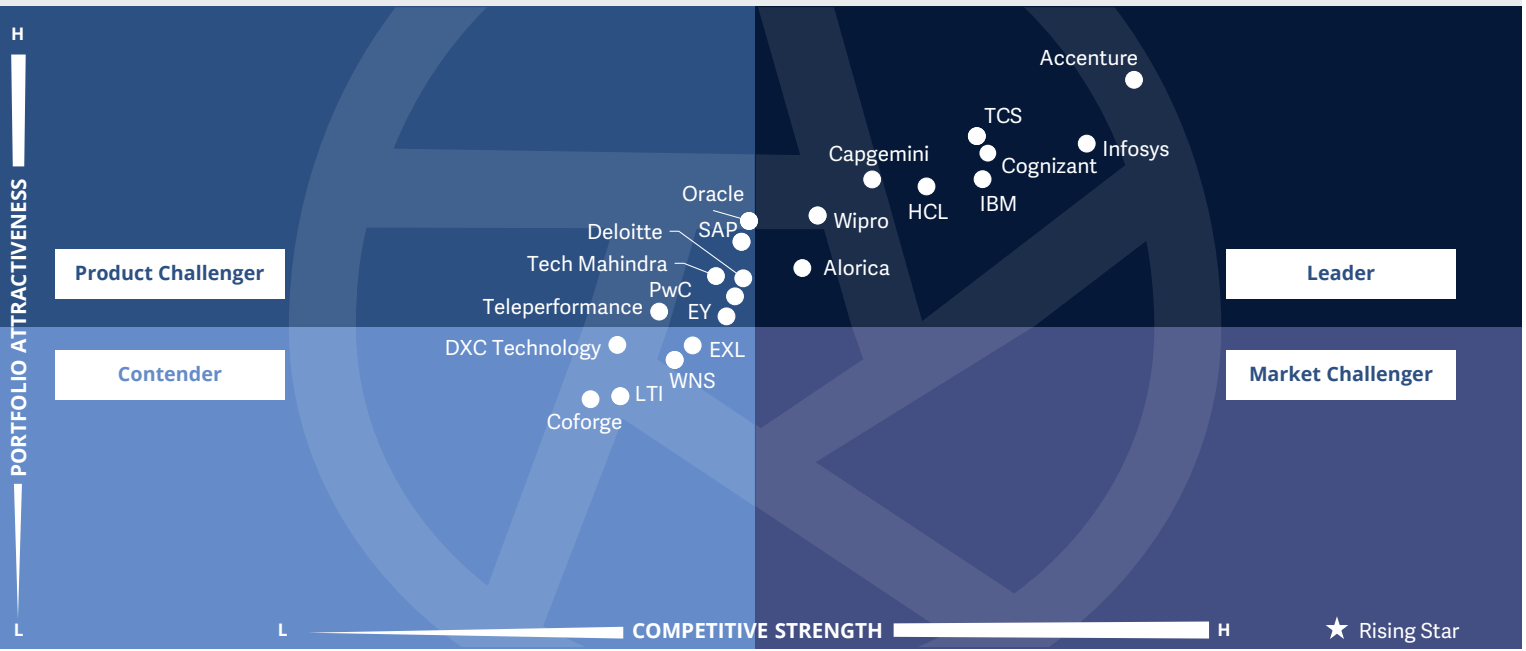
Customer experience professionals should read this report to better assess their utilities environment for opportunities to implement solutions and services to increase customer and staff experience and better strategize and invest in customer experience initiatives.

ISG Provider Lens™

Source: ISG RESEARCH

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

North America 2022



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.

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

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

Observations

The space is dominated by large providers and focused BPO players such 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 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 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 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, 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.

Leader

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

Swadhin Pradhan

Infosys

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.

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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

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.

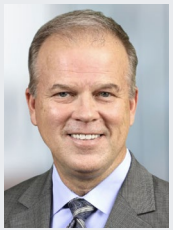
Research Specialist

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.

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For more information about ISG Provider Lens research, please visit this webpage.

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