

# Power and Utilities Industry – Services and Solutions

A research report comparing provider strengths,  
challenges and competitive differentiators



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The power and utilities industry is undergoing a profound transformation in 2026, driven by accelerating electrification, AI-enabled demand growth, sustainability commitments and the need for greater grid resilience. Utilities face the dual mandate of meeting rising electricity demand while maintaining affordability, reliability and decarbonization progress.

Across Europe and North America, capital is flowing into grid modernization to support AI data centers, EVs and industrial electrification. To safeguard reliability, utilities are prioritizing firm capacity — extending nuclear and gas plants while deploying long-duration storage. They are investing in distributed energy resources (DER) orchestration, upgrading low-voltage networks, and integrating battery storage with microgrids. Enabling technologies include AI-driven control centers that merge advanced distribution management systems (ADMS), distributed energy resource

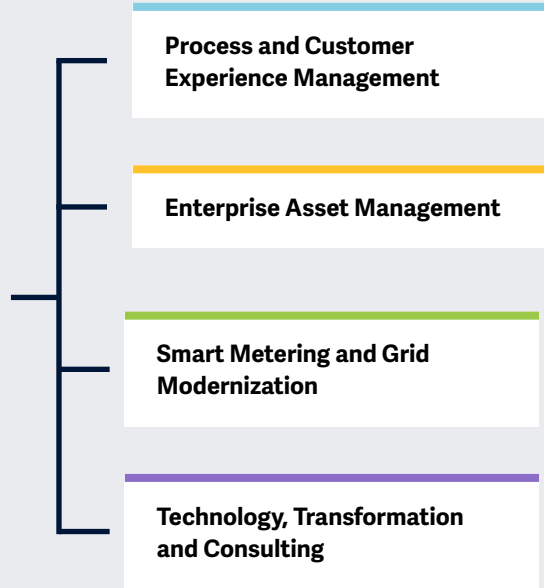
management systems (DERMS) and energy management systems (EMS) for real-time decision-making. Cloud platforms now power scalable analytics for storm response and market events, while cybersecurity-by-design protects increasingly interconnected IT/OT systems.

Service providers are emerging as strategic partners, delivering consulting, integration and managed services to accelerate digital transformation amid talent shortages. They enable converged IT/OT platforms, cloud engineering, intelligent business process management and CX platforms that reinvent utility business models beyond commodity selling. Whether fortifying European grids against climate volatility or interconnecting hyperscale data centers in North America, utilities are relying on these partners to unlock greater value from technology investments.



This study aims to understand the **power and utilities** industry's challenges and assess provider capabilities to address enterprise needs.

Simplified Illustration Source: ISG 2026



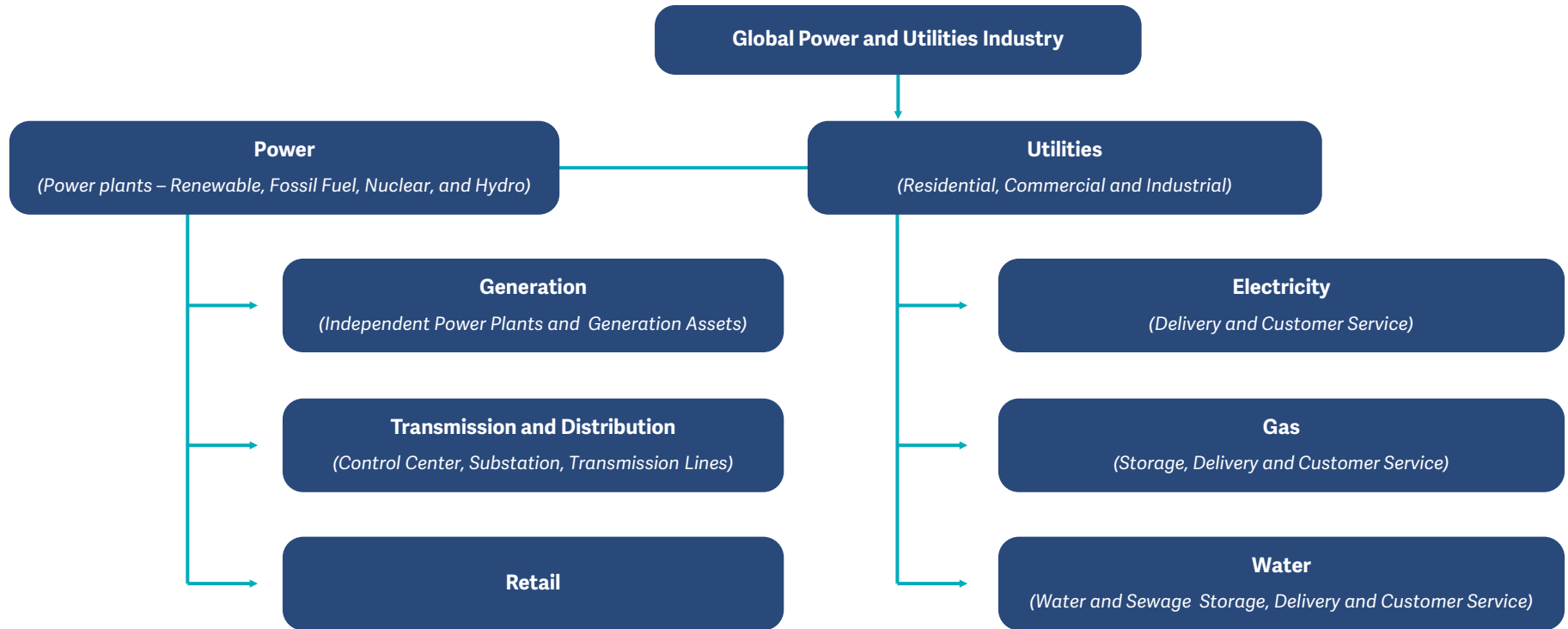
**The - ISG Provider Lens® Power and Utilities Industry — Services and Solutions 2026 study offers the following to business and IT decision-makers:**

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness
- Focus on markets in North America and Europe

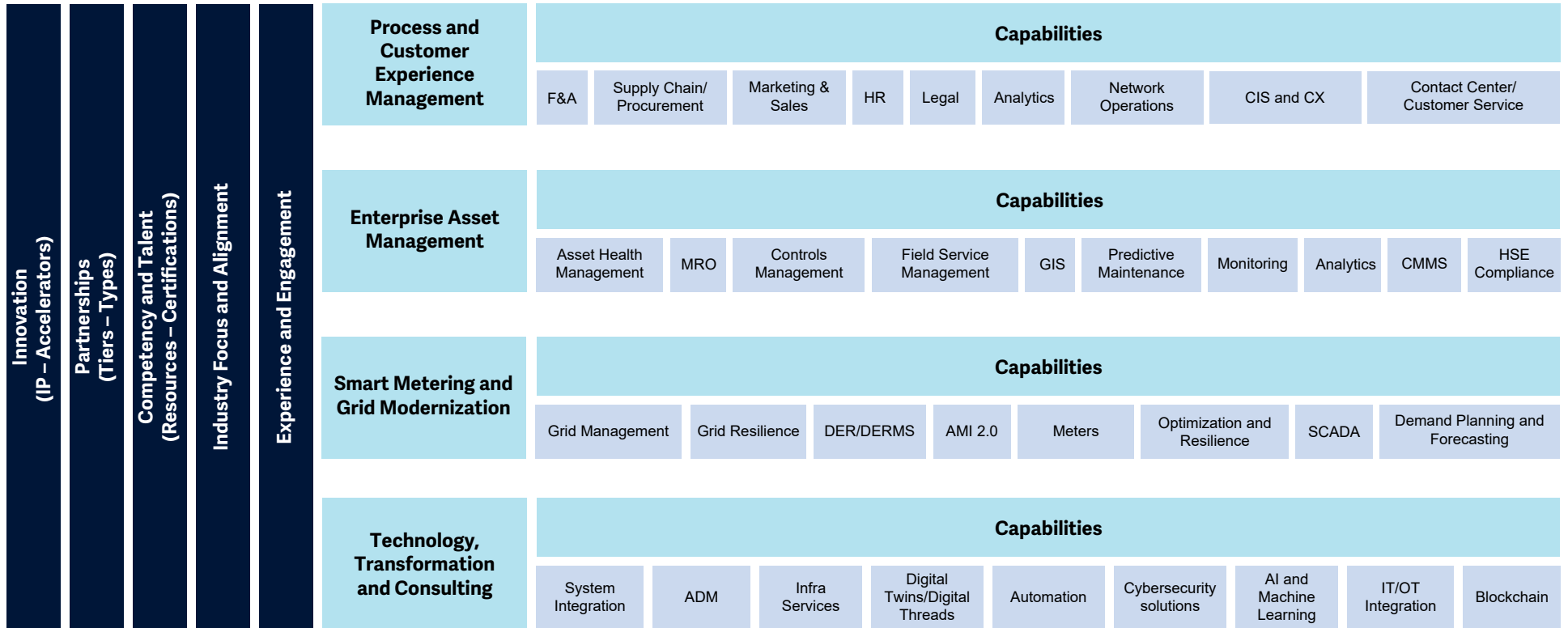
Our study serves as an important decision-making basis for positioning, key relationships, and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential engagements.



## Power and Utilities Industry Structure



## Blueprint of Power & Utilities Industry



\*Non-exhaustive



### Definition

The quadrant assesses service providers that offer intelligent business process management services (iBPMS) and meter-to-cash (M2C), customer service and customer information systems (CIS) solutions to the power and utilities industry. These automation-, AI- and analytics-driven services span front-, middle- and back-office functions, including customer service (B2B and B2C), sourcing and procurement, human resources, finance and accounting (F&A), regulatory and compliance, knowledge services, master data management, field workforce services and supply chain management.

These services enable client enterprises to improve operational efficiency and productivity, enhance CX and strengthen decision-making. Additional capabilities include order processing, rate design, billing, credit and collections, payment processing, contact center services and interactive voice response (IVR) to drive consumer engagement and relationship management.

### Eligibility Criteria

#### 1. Ability to offer a combination (if not all) of the following across the value chain with expertise in the assessed region:

- End-to-end business process management
  - Workflow visualization, design, execution, monitoring and optimization
  - Real-time process architecture mapping and modification capabilities
- F&A and BPO services
- M2C solutions
- HRM
- Field services management
- Demand response management
- Rule engine orchestrator

- Compliance management
- AI-driven process automation
- Regulatory and compliance management
- Supply chain and procurement
- Customer information and billing
- Personalized customer engagement
- Customer support and issue resolution
- Customer onboarding and qualification
- Feedback and continuous improvement
- Program and partner management
- Sustainability and ESG reporting

2. Experience in **optimizing business processes** for leading firms
3. Expertise in applying advanced technologies, including automation, analytics, IoT, AI, cybersecurity, cloud and blockchain
4. **Partnerships** with industry associations, regulatory bodies, technology firms, and power and utilities startups
5. **Referenceable case studies** for services/solutions across the value chain in key areas such as **AI, GenAI and other new-age technologies**



## Enterprise Asset Management

### Definition

This quadrant assesses providers offering enterprise asset management (EAM) services and solutions to enterprises in the power and utilities industry. Services include asset lifecycle management; maintenance, repair and operations; labor management; controls management; application maintenance and support; supply chain solutions; cloud services; asset health management; digital enablement services; and remote monitoring. These services enable enterprises to improve asset performance, extend asset life and reduce operating costs.

Service providers are pursuing M&A and developing proprietary EAM platforms to deliver industry-specific solutions that use technologies such as digital twins, augmented reality (AR), virtual reality (VR), mixed reality (MR) and 3D visualization. Field service management and workforce management remain core components of asset management.

### Eligibility Criteria

1. **EAM experience in the regional power and utilities industry**
2. **Successful EAM projects with at least two to three power and utilities firms**
3. Offerings in **at least three areas** below:
  - Asset performance management
  - Asset lifecycle management
  - Failure prediction
  - Geographic information system
  - Digital EAM solutions based on AI and ML
  - Work and labor management, including health, safety and environment (HSE)
  - Supply chain transformation management
  - Computerized maintenance management system
  - Controls management
  - Warranty management
  - Inventory and spare parts management
  - Analytics and reporting
  - Field services management
  - Work order management
4. Expertise in **next-generation technologies** – automation, analytics, IoT, AI, cybersecurity, cloud and blockchain
5. **Partnerships** with industry associations, regulatory bodies, technology firms and power and utilities startups
6. **Referenceable case studies** for services/solutions across the value chain in key areas such as **AI, GenAI and other new-age technologies**



### Definition

This quadrant assesses service providers offering grid modernization and related services and smart metering solutions for the power and utilities industry, covering electricity, gas and water. Grid management services include grid modeling, distributed energy resources management systems (DERMS), advanced distribution management systems (ADMS), geographic information systems (GIS), Volt/ VAR optimization (VVO), supervisory control and data acquisition (SCADA), advanced metering infrastructure (AMI), distribution operations, scheduling and dispatch, grid resilience, demand planning and forecasting, response design and integration, billing, and real-time monitoring.

These management offerings improve grid reliability and optimization. Smart metering solutions enable accurate readings, remote data access and insights into consumption patterns, leading to greater energy efficiency and cost savings for both consumers and utilities.

### Eligibility Criteria

#### 1. Experience in **grid**

**modernization** consulting and implementation

#### 2. Successful **grid modernization**

**projects** with at least two to three power and utilities firms

#### 3. Offerings **in more than one** of the following:

- AMI deployment
- Meter data management
- Customer engagement and portal services
- Pre-payment and flexible billing solutions
- Remote disconnection/reconnection
- Demand response enablement

- Data analytics
- Regulatory compliance services
- Distribution automation
- Grid assessment and road mapping
- ADMS
- DERMS
- GIS
- Grid hardening and asset management
- Grid stability and wide-area monitoring
- Protection and control systems modernization
- Cybersecurity for critical infrastructure
- Integration of prosumers and electric vehicles
- Volt/Var optimization and control

- Peak load management and automated alerts
- Sustainability and emissions reporting

#### 4. Expertise in **next-generation technologies**

– automation, analytics, IoT, AI, cybersecurity, cloud and blockchain

#### 5. **Partnerships** with industry associations, regulatory bodies, technology firms and power and utilities startups

#### 6. **Referenceable case studies** for services/solutions across the value chain in key areas such as **AI, GenAI and other new-age technologies**



### Definition

This quadrant assesses providers that offer consulting and digital transformation services that help power and utilities companies modernize IT infrastructure, streamline operations, improve efficiency and enable business transformation. Services include application development and maintenance (ADM); infrastructure services spanning data center, cloud, network, workplace and cybersecurity; and systems integration for new applications across the value chain. These services enable utilities to increase efficiency, ensure regulatory compliance, minimize costs, optimize assets and maximize customer satisfaction.

IT consulting and solutions in utilities use data, cloud and AI to improve operational efficiency and CX. Utilities aim to achieve transformation goals by simplifying processes and undertaking extensive reengineering, using digital tools and delivery methodologies that align with their strategic objectives to grow revenue, optimize costs, achieve operational excellence and enhance business process efficiency.

### Eligibility Criteria

1. Initiatives in **business and operations strategy**, change management and end-to-end transformation

2. Experience in **re-organizing IT operating models** as per changing business demands (GCCs, nearshoring, offshoring, agility and others)

3. **Ability to offer a combination (if not all)** of the following across the value chain, with expertise in the assessed region:

- Net zero and decarbonization strategy
- Regulatory, compliance and market design advisory

- Digital strategy and roadmap development
- Cloud migration and infrastructure modernization
- Enterprise data management and analytics platforms
- AI and ML integration
- Workforce digital enablement solutions
- Change management
- Training, onboarding and knowledge automation
- GenAI for digital twin and asset optimization
- Blockchain for energy trading and grid transactions
- ERP
- M&A advisory
- Operational consulting

- Robotics and automation
- Industry 4.0 initiatives (IT/OT integration)
- Cybersecurity and OT security

4. **Partnerships** with industry associations, regulatory bodies, technology firms, and power and utilities startups

5. **Experience in large transition projects** that include post-merger integration, business transformation and cybersecurity

6. **Referenceable case studies** for services/solutions across the value chain in key areas



## Quadrants by Regions

As a part of this ISG Provider Lens® quadrant study, we are introducing the following four quadrants in the Power and Utilities Industry — Services and Solutions 2026 report:

Quadrant	North America	Europe
Process and Customer Experience Management	✓	✓
Enterprise Asset Management	✓	✓
Smart Metering and Grid Modernization	✓	✓
Technology, Transformation and Consulting	✓	✓



# ISG's Power and Utilities Framework

## Key characteristics of the proprietary framework:

- Encapsulates what enterprises are doing across the ISG Provider Lens® Power and Utilities Industry — Services and Solutions 2026 market study and helps connect them to digital solutions
- Represents the entire value chain of supply and demand in the market
- Inner tiles represent themes of enterprise objectives
- Outer tiles represent initiatives
- Behind each outer tile is a specific set of capabilities with unique market-leading providers and solutions



The research phase falls in the period between July and September 2026, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in January 2027.

<b>Milestones</b>	<b>Beginning</b>	<b>End</b>
Survey Launch	30 <sup>th</sup> June 2026	
Survey Phase	1 <sup>st</sup> July 2026	29 <sup>th</sup> July 2026
Sneak Preview	October 2026	
Press Release & Publication	December 2026	December 2026

Please refer to the [ISG Provider Lens® 2026 research](#) agenda to view and download the list of other studies conducted by ISG Provider Lens®.

#### **Access to Online Portal**

You can view/download the questionnaire from [here](#) using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

#### **Buyers Guide**

ISG Software Research, formerly “Ventana Research,” offers market insights by evaluating technology providers and products through its Buyers Guides. The findings are drawn from the research-based analysis of product and customer experience categories, ranking and rating software providers and products to help facilitate informed decision-making and selection processes for technology.

In the course of the Power and Utilities Industry – Services and Solutions IPL launch, we want to take advantage of the opportunity to draw your attention to related research and insights that ISG Research will publish in 2026. For more information, refer to the [Buyers Guide research schedule](#).

#### **Research Production Disclaimer:**

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens® reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.



### ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of “Voice of the Customer.”

The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers’ success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to [nominate](#) their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence™ will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ [website](#).

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:  
[star@cx.isg-one.com](mailto:star@cx.isg-one.com)



**ISG Star of Excellence**



The ISG Provider Lens® 2026 – Power and Utilities Industry — Services and Solutions 2026 research study analyzes the relevant software vendors/service providers in the global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

**Study Sponsor:**

Iain Fisher

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**Research Analyst:**

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**Data Analyst:**

Sumit Kumar

**Project Manager:**

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The research and analysis presented in this study will include data from the ISG Provider Lens® program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

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



## Contacts For This Study

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Pradhan  
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Harish B  
**Lead Analyst –  
Europe**



Arjun Das  
**Research Analyst –  
North America  
and Europe**



Sumit Kumar  
**Data Analyst**



Krishnanunni P  
**Senior Project  
Manager**



### ISG Provider Lens® Advisors Involvement Program

ISG Provider Lens® offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three consultant advisors participate as part of each study's quality and consistency review process.

The consultant advisors ensure each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the consultant advisors' group and contribute at different levels depending on their availability and expertise.

The consultant advisors:

- Help define and validate quadrants and questionnaires
- Advise on service provider inclusion and participate in briefing calls
- Give their perspectives on service provider ratings and review report drafts

## ISG Advisors to this study



Jon  
Brock

**Account Director –  
Energy and  
Utilities, US**



Korey  
Barnard

**Partner – Energy and  
Utilities, US**



Richard de  
Beijer

**Director**



Sam  
Barringer

**Service Line  
Director**



## Invited Companies

**If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.**

\* Rated in previous iteration

Accenture\*

Adactin

Afry

Akkodis

Alctra Energy Solutions

Alorica\*

Altair

ALTEN

Ampcus\*

Arvato Systems

ASG

Asseco Group

Atento

Atkins Realis\*

Atos\*

Avantis\*

Bahwan Cybertek

Baringa\*

BIP Group

Birlasoft

BITHGROUP Technologies

Bonitasoft

Bosch SDS

Boston Change Management Partners

Bursys

CAI

Capgemini\*

CAPITA

Caresoft Global

Cascadia Consulting Group

Centum

CGI\*

CMS IT Services

Coforge\*

Cognizant\*

Compucom

Computacenter

Concentrix\*

Conduent

Core Environmental Consultants

Credera

Cube Enterprise

Cyient\*

Daffodil Software

Deloitte\*

Drivz

DXC Technology\*

eInfochips

Emerton\*

Enzen

Endava

Engineering Industries eXcellence

Ensono

EOSGlobe

EPAM

Eraneos\*

E-Source

EXL\*

Expleo

EY\*



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\* Rated in previous iteration

e-Zest/Accion Labs

Fairland Company

Firstsource\*

Foundever

FPT Software

FTI Consulting\*

Fujitsu\*

Genpact\*

GEP

Globant

GNC Consulting

Happiest Minds

HCLTech\*

Hexaware Technologies

Hitachi Digital Services\*

Huron Consulting

IBM\*

ICF\*

ITC Infotech

Inetum

Infosys\*

Innova Solutions

Innover Digital

Kaartech

Kongsberg Digital

KPMG\*

Kyndryl\*

Leidos

Liveops

LTIMindtree\*

LTTS

Lumen Technologies

Mastek

Microland

Mphasis

Minsait

Nagarro\*

Naviam

NEC Corporation

N-iX

NTT DATA\*

Orange Business

PA Consulting

Paradigm Technology

Persistent

Perficient\*

Power Reply\*

Probe CX

PS Energy

PS2G

Publicis Sapient

PwC\*

Qualitest\*

Quest Global

Reply Power

ResultsCX

Rivera Consulting

RPS Group

rSTAR Technologies

SATEC GROUP



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\* Rated in previous iteration

ScienceSoft USA Corporation

Serco

Siemens Advanta

SEW.AI

Sigma

SII

Softdel

Softserve

Softtek

Sopra Steria\*

Stefanini

Sutherland\*

Synch-Solutions

Synoptek

T Systems

TCS\*

Tech Mahindra\*

Techwave

The Ascent Group

The Canton Group

The Silicon BlackGroup

Tieto\*

TMG Consulting

TP (Teleperformance)\*

Unisys

UST

Utilidata

Virtusa

V2Soft

Wipro\*

World Wide Technology

YASH Technologies

Zensar

Zones\*



## 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](#).

## Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: [Public Sector](#).

For more information about ISG Research™ subscriptions, please email [contact@isg-one.com](mailto:contact@isg-one.com), call +1.203.454.3900, or visit [research.isg-one.com](http://research.isg-one.com).

## 

ISG (Nasdaq: III) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

For more information, visit [isg-one.com](http://isg-one.com).





**JULY, 2026**

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