

Power and Utilities Industry – Services and Solutions

A research report comparing provider strengths,
challenges and competitive differentiators



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The global power & utilities industry continues to be affected by the steadily increasing demand for renewable energy sources and sustainability, government regulations, smart cities, electric mobility, geopolitical situations and rising fossil fuel prices.

Post the COVID-19 pandemic peak, utilities are looking to invest in new-age technologies and infrastructure to improve resiliency and reliability as extreme weather conditions drive capital spending. Irrespective of the nature of the business (electricity, gas, water or retail), utilities need to strive to develop intelligent solutions, improve operational efficiency, increase reliability and understand clients' challenges.

The path forward in 2023

Moving into 2023, the power & utilities industry will continue to fight challenges around clean energy, reliability, resiliency

and security, while keeping waste and technical debt to a minimum and continuing strategic investments. To address these issues, the industry needs to accelerate decarbonization, digitalization and decentralization.

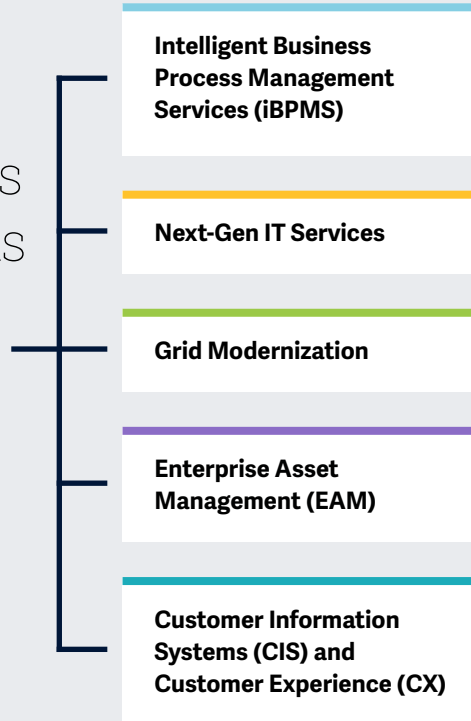
In addition, various government regulations such as the Inflation Reduction Act (IRA) of 2022 and the Infrastructure Investment and Jobs Act (IIJA) of 2021 will prompt investments by the U.S. utilities sector in infrastructure and cleantech. Globally, the power & utilities industry will continue to focus on new business models, improving customer experience and optimizing financial performance and operational efficiency.

Essentially, utilities are seeking service providers that can demonstrate deep industry expertise, along with strong digital technologies and innovation capabilities around data and analytics, cybersecurity, machine learning and AI.



This IPL study, Power & Utilities Industry – Services and Solutions, aims to **understand** key industry **challenges** and **assess** service **provider capabilities**.

Simplified Illustration Source: ISG 2023



The ISG Provider Lens™ study offers business and IT decision-makers in power & utility companies the following:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments based on their competitive strengths and portfolio attractiveness
- A view of the market in North America, Europe and Australia

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 with utilities.



Definition

The quadrant assesses service providers that offer power & utilities clients business process management (BPM) services that are driven by automation and analytics, including 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, operational business intelligence (customer, marketing and asset) and supply chain management. These services enable the client companies to improve efficiency and productivity in daily operations and business processes (front, middle and 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 **companies in the power & utilities space** across the industry value chain, with local expertise in the assessed region or country:
 - * F&A
 - * Sourcing, procurement and supply chain
 - * Customer service
 - * Human resources (HR)
 - * Legal
 - * Regulatory and compliance
 - * Media and content management
 - * Master data management
 - * Field workforce services
 - * Network operations
 - * Analytics
2. Knowledge of the **industry and local/regional regulatory requirements**
3. Experience in **optimizing business processes** for clients, predominantly in this industry
4. Expertise in **applying next-gen technologies**, including automation, analytics, IoT, AI, cybersecurity, cloud and blockchain, for client engagements in this space
5. Demonstrate **strong partnerships** with industry associations, regulatory bodies, technology firms and startups specializing in power & utilities
6. Offer **referenceable case studies** for various services and solutions across the value chain



Definition

This quadrant assesses service providers offering IT managed services to the power & utilities industry. The services include application development and maintenance (ADM), infrastructure services (data center, cloud, network, workplace and cybersecurity) and systems integration (such as for new applications) across the value chain. They enable utilities to increase efficiency, ensure compliance, minimize costs, optimize assets and maximize customer satisfaction.

Eligibility Criteria

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



Definition

This quadrant assesses service providers offering grid modernization and related services in the power & utilities sector. The services include grid modeling, distributed energy resources management system (DERMS), advanced distribution management system (ADMS), geographic information system (GIS), volt-var optimization (VVO), supervisory control and data acquisition (SCADA), advanced metering infrastructure (AMI), distribution and operations, scheduling and dispatch, grid resilience, demand planning and forecasting, response design, and integration – leading to an improved, reliable, and optimized grid infrastructure.

Eligibility Criteria

1. Exposure of **working around grid modernization** and related services for clients in the market
2. Demonstrate **successful grid modernization-related engagements** (past and present) with at least three power & utility companies
3. Provide **offerings and services** in more than one of the following areas:
 - * Grid modeling
 - * Grid management (distribution and operations, scheduling and dispatch)
 - * Grid optimization and resilience
 - * Demand planning, forecasting and outage management
 - * DER technology selection, strategy and roadmap
 - * DER aggregation and integration
 - * DERMS
 - * EV charging integration
 - * ADMS
 - * SCADA
 - * GIS
 - * VVO
 - * Advanced metering and smart grid services
 - * Distribution automation services
 - * Integration and value realization
4. Expertise in **applying next-gen technologies**, including automation, analytics, IoT, AI, cybersecurity, cloud and blockchain
5. Demonstrate **strong partnerships** with industry associations, regulatory bodies, technology firms and startups, specializing in power & utilities
6. Offer **referenceable power & utilities case studies**



Enterprise Asset Management (EAM)

Definition

This quadrant assesses providers offering EAM services and solutions to clients in the power & utilities space. The 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 service and remote monitoring. They enable client companies to increase asset performance and extend their useful life, and reduce operational costs.

Eligibility Criteria

1. Exposure to **enterprise asset management** for clients in the power & utilities industry in the country/region
2. Demonstrate **successful EAM-related engagements** (past/present) with at least three power & utility companies
3. Provide **offerings and services** 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
4. Expertise in **applying next-gen technologies**, including automation, analytics, IoT, AI, cybersecurity solutions, cloud and blockchain, for clients in this space
5. Demonstrate **strong partnerships** with industry associations, regulatory bodies, technology firms and startups specializing in power & utilities
6. **Referenceable power & utilities case studies** for various services and solutions across the value chain



Customer Information Systems (CIS) and Customer Experience (CX)

Definition

This quadrant assesses service providers offering CIS-related meter-to-cash (M2C), customer service and business process solutions in the power & utilities sector. 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 (CX).

Eligibility Criteria

1. Exposure to **working in CIS and CX** for the power & utilities clients in the market
2. Demonstrate **successful CIS-related engagements** (past and present) with at least three power & utility companies
3. Provide at least one of the following **offerings related to CIS**:
 - * Meter-2-cash
 - Account management
 - Order processing
 - Product/service management
 - Rate design (handling complex/TOU rate structures)
 - Billing
 - Credit and collections
 - Accounts receivables
 - Statement preparation
 - Payment processing
 - * Customer service
 - 24/7 contact or call centers (customer interaction)
 - IVR services
 - Consumer engagement (social media, virtual assistant and chatbots)
 - Customer self-service
 - Relationship management
4. Ability to **adapt to changes** in regulations, compliance, rate structures and evolving billing and retail needs
5. Expertise in **applying next-gen technologies**, including automation, analytics, IoT, AI, cybersecurity solutions, cloud and blockchain, for power & utilities clients
6. **Strong partnerships** with industry associations, regulatory bodies, tech firms and startups specializing in power & utilities
7. Referenceable power & utilities **case studies across the value chain**



Quadrants By Region

As part of this ISG Provider Lens™ quadrant study, we are introducing the following five quadrants on Power & Utilities Industry – Services and Solutions 2023

Quadrant	North America	Europe	Australia
Intelligence Business Process Management Services (iBPMS)	✓	✓	✓
Next-Gen IT Services	✓	✓	✓
Grid Modernization	✓	✓	✓
Enterprise Asset Management (EAM)	✓	✓	✓
Customer Information System (CIS) and Customer Experience (CX)	✓	✓	✓



The research phase falls in the period between January and February 2023, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in June 2023.

Milestones	Beginning	End
Survey Launch	January 16, 2023	
Survey Phase	January 16, 2023	February 10, 2023
Sneak Preview	May 2023	May 2023
Press Release and Publication	June 2023	

Please refer to the [link](#) to view/download the ISG Provider Lens™ 2023 research agenda

Access to Online Portal

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

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 Future Source™ 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 Voice of the Customer concept. 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: ISG.star@isg-one.com

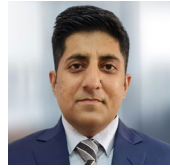


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**Project
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ISG Provider Lens™ Advisors Involvement Program

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 advisors participate as part of each study's quality and consistency review team (QCRT). The QCRT ensures 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 QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

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

ISG Advisors to this study



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Troy
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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*	Capita	Emtec	HCLTech*
AcquireBPO	Centric Consulting	EOSGlobe Inc.	Hitachi Vantara*
Adactin	CGI*	EPAM Systems	Huron Consulting
Alorica*	Cigniti*	Escient	IBM*
Arq Group	Coforge*	Exela Technologies	IgniteTech
Arvato	Cognizant*	EXL*	Infosys*
ASG	Comdata Group	EY*	Intelcia (Unisono)
Asseco Group	Computacenter*	Firstsource	Invensis Technologies
Atento	Concentrix	FTI Consulting	iQor
Atos*	Conduent*	Fujitsu	KPMG
AuraQuantic	Covalen solutions	Genpact*	Krish Compusoft
Birlasoft*	CyberCX	GEP	Kyndryl
Bonitasoft	Cyient	Globant	Leidos
BP Logix	Deloitte*	GTCSYS	LTIMindtree*
Capgemini*	DXC Technology*	Happiest Minds	LTTS



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* Rated in previous iteration

MaxBPO	Softtek*	Vertexone
Microland	Sonata Software	VOLANS
Minsait (Indra Company)	Sopra Steria	Vysus
Movate (formerly CSS Corp)	T Systems	Webcon
Mphasis	TCS*	Wipro*
NTT DATA*	Tech Mahindra*	WNS*
Onenec	Techwave	Working Solutions
Optus	Teleperformance*	YASH Technologies*
Orange Business Services	TELUS International	
Perficient	TietoEVRY	
Protiviti	Timmons Group	
PSC	TMG Consulting	
PwC*	TTEC	
Signavio	Ultimus	
Sitel Group (Sykes Enterprises)	Unisys	



About Our Company & Research

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](#).

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





JANUARY, 2023

REPORT: POWER AND UTILITIES INDUSTRY – SERVICES AND SOLUTIONS