



***ISG** Provider Lens™

2021

Utilities Industry - Services
and Solutions 2021

imagine your future®

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Definition

Utilities are an essential component in several production and consumption activities and play a vital role in a country's economic growth. Companies engaged in the utilities industry are primarily focused on the generation, transmission, distribution, treatment, transportation, storage, marketing, metering and retailing of electricity, water and natural gas to residential, commercial or industrial customers. The utilities industry is undergoing a drastic transformation to a clean-energy future, a more digital and distributed grid and an era of bespoke customer service. Companies need to make substantial capital investments to upgrade aging infrastructure, transform distribution and storage systems, harness smart grid technologies and shift to renewables, and consider climatic changes while reducing operational and maintenance costs in an era of economic uncertainty.

Key challenges, including increased competition, decreasing energy demand as a direct impact of the COVID-19 pandemic and subsequent lockdowns, growing customer expectations, rising costs from climate-related disasters, price volatility, cybersecurity risks, an aging workforce and stringent regulatory guidelines are driving utilities companies to look for transformational sourcing options that would help them deliver superior business performance along with an enhanced customer experience. With increasing asset costs, many utilities clients are investing in technologies that prolong asset life as well as optimize utilization. For example, companies are using predictive analytics in an effort to reduce down time by proactively undertaking repairs. They are primarily looking for providers that demonstrate deep utilities industry expertise, along with strong digital technologies and innovation capabilities.

This study on Utilities Industry - Services and Solutions is aimed at understanding utility companies' requirements for the digital age and service provider capabilities in meeting these requirements.

The ISG Provider Lens™ study offers business and IT-decision makers in utilities companies with 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

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.

Quadrants Research

As part of this ISG Provider Lens™ quadrant study, we are introducing the following three quadrants on Utilities Industry - Services and Solutions:

Simplified illustration

Utilities Industry - Services and Solutions			
Intelligent Business Process Management Services	Next-Gen IT Services	Digital Transformation Services and Solutions	
Wholesale	Generation	Transmission and Distribution	Retail
Supply planning and sourcing	Asset management	Smart grid services	Customer acquisition
Trading and risk management	Engineering and R&D	Transmission planning and scheduling	Utilities marketing services
Market integration	Production forecasting and optimization	Ancillary services	Customer service
Market operations	Production forecasting and optimization	Infrastructure maintenance	Field service operations
Market systems services	Plant maintenance	Load balancing and dispatching	Metering and billing
Portfolio strategy	Data management	Energy storage integration	Exception management
Asset optimization	Generation asset development	Grid optimization and aggregation	Debt collection and credit management
	Generation operations	Asset performance management	Sales channel management
	Renewables	Distributed energy resources (DER) integration	Omni-channel management (voice, non-voice, social media, digital)
	Holistic security services	Distribution management	Customer management
	Real-time operations	Smart meter rollout and operations	Beyond the meter services
		Demand response management	Energy management
		Meter data management	Electric vehicle services
		Electric vehicle infrastructure	
	Environment, health, safety, and security		
	Geospatial Information System (GIS)		
	Engineering, procurement, and construction (EPC) management		
	Planning and contract management		
Underpinned by RPA, AI, Analytics, IoT, Cloud, Mobility, Cybersecurity, Blockchain etc.			

Source: ISG 2021

Intelligent Business Process Management Services

This quadrant will assess business process outsourcing (BPO) providers that offer a range of business process management services to utilities companies, including customer management services (front and back-office), finance and accounting, meter-to-cash, procurement services, HR services, legal and regulatory compliance services, knowledge management, capital project management, document management, field workforce/ services management, maintenance, repair and operations, operational business intelligence (customer, marketing, and asset) and supply chain management services. The nature of these transactions would not only require a service provider to understand the domain and industry specifics, but also involve expectations in terms of active use of automation and analytics at utilities companies. These are aimed at enabling companies to reduce inefficiencies both in the field and in front or back-office activities, pave the way for reduced risk and cost, enable greater efficiencies, deliver high-quality customer experience and make better data-driven decisions that generate new value and growth.

Eligibility criteria:

- Service providers must:
 - Offer above-mentioned business process management services to utility companies in one or more areas across the value chain with local expertise in the assessed region or country
- Service providers should have:
 - Deep domain knowledge of the utilities industry and local regulatory and compliance requirements
 - Experience in optimizing business processes, predominantly in the utilities industry
 - Knowledge of how to leverage emerging technologies, including automation, analytics, internet of things (IoT), artificial intelligence (AI), cybersecurity solutions, cloud and blockchain
 - Established or emerging partnerships with industry associations, regulatory bodies, technology firms and startups specializing in the utilities industry
 - Referenceable utilities case studies

Next-Gen IT Services

This quadrant will assess IT service providers that offer IT managed services, including application development and maintenance (ADM) services, infrastructure services (data center, cloud, network, workplace and security) and systems integration services (including new application development) to utilities customers across the value chain that may include emerging technologies such as automation, analytics and AI and IoT. These are aimed at enabling utility companies to increase productivity and efficiency, ensure compliance, minimize costs, optimize assets and maximize customer satisfaction.

Eligibility criteria:

- Service providers must:
 - Provide above-mentioned IT services to utilities companies in one or more areas across the value chain with local expertise in the assessed region or country
- Service providers should have:
 - Deep domain knowledge of the utilities industry and local regulatory and compliance requirements
 - Knowledge of how to leverage emerging technologies, including automation, analytics, IoT, AI, cybersecurity solutions, cloud and blockchain
 - Established or emerging partnerships with industry association, regulatory bodies, technology firms and startups specializing in the utilities industry
 - Experience in large transition projects that include merged companies and modernization of systems and applications in the utilities industry
 - Referenceable utilities case studies

Digital Transformation Services and Solutions

This quadrant will assess service providers (IT, BPO, and/or Consulting) that help utilities companies to assess, design, build, run and accelerate their digital transformation initiatives. It will also assess service providers based on their capability to innovate, leverage emerging technologies, transform business processes and provide proprietary platform-based solutions. These are aimed at enabling utility companies to enhance customer satisfaction, streamline operations, reduce costs and achieve greater efficiencies.

Eligibility criteria:

- Service providers must:
 - Provide digital transformation consulting services to help utilities customers in formulating their digital roadmap and build short- and long-term digital strategies
 - Offer advice and guidance on process optimization to deliver tangible benefits
- Service providers should have:
 - Strong consulting and change management capabilities to help utilities companies in internal buy-in (for example, business case or justification for digital transformation initiatives) and guide them through their digital transformation journey
 - Ability to innovate and provide proprietary platform-based solutions to modernize and streamline utilities operations
 - Expertise in emerging technologies, including automation, analytics, IoT, AI, cybersecurity solutions, cloud and blockchain
 - Deep domain knowledge of the utilities industry and local regulatory and compliance requirements
 - Established or emerging partnerships with industry association, regulatory bodies, technology firms and startups specializing in the utilities industry
 - Referenceable utilities case studies

Quadrants by Region

Quadrants	Global	North America
Intelligent Business Process Management Services	Overview	√
Next-Gen IT Services	Overview	√
Digital Transformation Services and Solutions	Overview	√

Schedule

The research phase falls in the period between **February and March 2021**, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in **May 2021**.

Milestones	Beginning	End
Launch	February 22, 2021	
Survey phase	February 22, 2021	March 15, 2021
Sneak preview	April, 2021	
Press release	May, 2021	

Please refer to the [link](#) to view/download the ISG Provider Lens™ 2021 research agenda:

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!

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.

Partial list of companies being invited for the survey

Are you on the list or do you see your company as a relevant provider that is missing in the list? Then feel free to contact us to ensure your active participation in the research phase.

Accenture

Alorica

Asseco Group

Atos

Birlasoft

Capgemini

CGI Group

Cigniti Technologies

Coforge

Cognizant

Computacenter

Concentrix

Conduent

CSS Corp

Cyient

Datamatics

Deloitte

DXC

EPAM Systems

Exela Technologies

EXL

Fujitsu

Genpact

HCL

Hexaware Technologies

IBM

Infosys

L&T Technology Services

Larsen & Toubro Infotech (LTI)

Mindtree

Mphasis

NTT Data

PwC

Sitel

Softtek

Sonata Software

Sopra Steria

Sykes

TCS

Tech Mahindra

TechWave

Teleperformance

TeleTech

TELUS

TietoEVRY

UST

Wipro

WNS

Yash Technologies

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Do you need any further information?

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