

***ISG** Provider Lens™

Utilities Industry - Services and Solutions

North America 2021

Quadrant
Report



A research report
comparing provider
strengths, challenges
and competitive
differentiators

Customized report courtesy of:



June 2021

About this Report

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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 April 2021, 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.

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1	Executive Summary
4	Introduction
15	Intelligent Business Process Management Services
20	Next-Gen IT Services – Large Accounts
25	Next-Gen IT Services – Midmarket
29	Digital Transformation Services and Solutions – Large Accounts
35	Digital Transformation Services and Solutions – Midmarket
38	Methodology

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EXECUTIVE SUMMARY

Covid-19 Pandemic is Pressing Utilities to Extend Resilience Across the Value Chain

Utilities were traditionally focused on evolving their infrastructure to deal with extreme weather events and natural disasters. However, the COVID-19 pandemic has made the entire value chain, from wholesale, generation, transmission and distribution to retail, vulnerable and subsequently compelled it to become more resilient in operations, supply chain, workforce, cybersecurity, finance and capital planning.

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/digital foundation, transforming grid operations, digitally enabling the workforce, and improving customer experience through various digital channels. It sees the following trends in the global utilities industry:

Renewables driving M&A

Companies are rebalancing and rationalizing their portfolios in accordance with environmental, social and governance (ESG) efforts and commitments towards net-zero targets; governments also are offering incentives and directives. As a result, more mergers and acquisitions (M&As) and other consolidations are expected to take place in the energy and utilities industry across the transmission and distribution and retail value chain in 2021.

Growing penetration of distributed energy

Utilities are moving rapidly towards wind, solar and other green sources of energy and are reducing their dependence on coal and fossil fuels. The rapid penetration of renewables, storage and distributed energy resources (DER) is impacting the traditional operating patterns of transmission and distribution companies and system operators. These companies now require more flexible and advanced capabilities for supply and demand forecasting as well as grid inertia assessments, network modelling and optimization, fluid market messaging and collaboration, automated demand response, situational awareness and advanced training tools. Providers of next-generation IT and digital transformation services in this space are deploying data management and data science capabilities to develop the aforementioned operational competencies for electric utility operators.

Grid modernization in focus

Basic infrastructure upgrades, smart metering, automated outage prediction, resilience under natural calamity and grid modernization are high on the agenda of every utilities company. The growing reliance on renewables and the impacts of climate change are driving substantial investments towards grid modernization and maintenance, more sensor use in power and water networks, and the development of more sophisticated analytics, forecasting, modelling and optimization capabilities. The industry is investing in grid resiliency programs that will allow for more robust responses to tail events.

Competition from niche players, particularly in deregulated markets

Large utilities players are under pressure from regulators to keep energy prices low and are losing market share to nimble, asset-light competitors, thus impacting their profitability. Providers of next-generation IT and digital transformation services in this space are helping utilities companies to virtualize their infrastructure, redistribute work locations and use bot-based automation to eliminate costs and remain competitive.

Increased competition from other industry and new revenue streams

With the advent of renewables generation and electric vehicles (EVs), the lines of operations between utilities and adjoining sectors such as oil and gas are blurring. Over the last few years, some of the large oil and gas companies have made bold investments in the utilities sector as part of long-term plans to decarbonize their energy portfolios. This trend is likely to persist due to the reduced demand caused by the pandemic and as oil companies move past the immediate impact of the oil price drop. As a result, utilities companies may increasingly work together or compete with oil companies. Furthermore, as the demand from traditional sectors matures, the massive shift towards electric vehicles (EVs) and charging infrastructure will provide a new revenue stream for utilities.

Legacy landscape and resistance to change hindering digital adoption

The utilities industry faces steep challenges in modernizing the customer service infrastructure. Given the sheer size and scale of utility customer information systems (CIS), replacing them requires significant time, capital and organizational energy. As a result, many companies in this space tend to delay modernizing their CIS until the legacy system

is on its last legs. Moreover, as it is a highly conservative sector, insufficient attention to organizational change management (OCM) has been hindering the acceptance of new technologies by utilities stakeholders. Providers are helping companies address these challenges through: reusable and reliable execution frameworks to de-risk CIS transformation; tools and accelerators to minimize the CIS replacement cost, timeline and risks; and investments in training and persona-based organizational change management initiatives to drive stakeholder acceptance and unlock the true potential of digital transformation.

Digital customer experience

With investments starting to gain pace, utilities are investing in digital customer service platforms to facilitate a more seamless and multi-channel customer experience. It is no longer just about service orders and making payments; this sector is expected to interact with customers across a variety of channels such as voice, text, social media and in person. To meet this demand, many companies in this space are investing in 360° customer platforms, chatbots and other self-service technologies that enable a digital customer experience. Providers are helping them deploy advanced analytics to anticipate customer needs, reduce customer call volumes, improve efficacy of outbound calling, reduce high debt and enhance the customer experience while also redesigning the digital customer experience and call center performance.

Strong demand for digital workplace services and cloud-based solutions

The top priority of utilities in the new normal is to protect employee health and safety while enhancing both field and office productivity. This calls for rapid and well-informed decision making for adopting remote digital workplace technologies, including digital collaboration tools and automation of repetitive tasks, in a secure manner. Providers in this space have built agile work-from-anywhere models with enhanced cybersecurity, enterprise digitization and data transparency for enterprise clients. Additionally, there is a growing trend towards the use of cloud-based solutions that enable greater continuity of operations and enhance customer service. However, the industry is facing challenges in availing these solutions. Subscription costs, specifically from cloud service providers, have traditionally been categorized as operations and maintenance (O&M) expenses, for which on-premises software licenses can be capitalized. Given the incentives for minimizing O&M and maximizing capital, utilities face financial disincentives to leverage some of the most advanced, cloud-based solutions. Several leading next-generation IT service providers are addressing this challenge by building assets that the industry can use to capitalize on cloud technologies.

More digital transformation deals and lead system integrator capability

With the rapid digitization and increased investments in modernizing grid and IT-OT systems, the utilities industry is seeing more digital transformation sourcing engagements compared to traditional IT managed services and business process management (BPM) deals. Furthermore, digital transformation deals are leaning on single system integrator

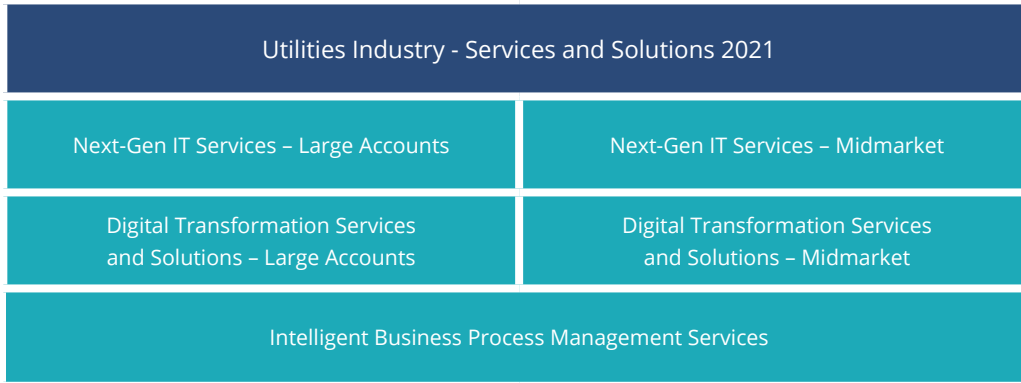
as the main providers of end-to-end services, unlike in the past where there were multiple vendors engaged in different kinds of services for the same program. Utilities are usually looking for a single point of accountability with the system integrator, with the SI even taking the lead bringing in consortium of partners (as needed) to deliver end-to-end services.

Business outcome-based services/pricing getting traction: BPM and IT managed services have been used for many years, but newer deals are seeking more business outcome-based services and service-level agreements (SLAs) compared to traditional IT SLAs. Concurrently, providers are confident about promising higher productivity/outcomes while negotiating sourcing engagements. Outcome-based pricing is particularly gaining favor among these companies, specifically for the mature stage of digital transformation.

Preparing the utilities workforce of the future: The utilities industry is facing a major crunch in digital skills. There is a shortage of qualified talent for new jobs, many of which require competencies in artificial intelligence (AI), machine learning (ML), robotics and advanced analytics. With the growing importance of digital technologies, the industry is pushed to enable technologists across their organizations, put tools in the hands of business users, and reshape the traditional role and approach to IT. Therefore, training and upskilling existing workers on emerging technologies is crucial. Several of the world's leading utilities companies are collaborating with providers to upskill the affected workforce on such digital skills that enable and empower them to focus on higher-value tasks and activities.

Introduction

Simplified illustration



Source: ISG 2021

Definition

Utilities are an essential component in several production and consumption activities and play a vital role in a country's economic growth. Companies in this industry are focused on the generation, transmission, distribution, treatment, transportation, storage, marketing, metering and retailing of electricity, water and natural gas to residential, commercial and industrial customers. This sector is undergoing a drastic shift towards 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, shift to renewables and consider climatic changes, while reducing operational and maintenance costs in an era of economic uncertainty.

Definition (cont.)

Key challenges such as the intensified competition, decreasing energy demand due to the direct impact of the COVID-19 pandemic and subsequent regional lockdowns, growing customer expectations, rising costs from climate-related disasters, price volatility, cyber-security risks, aging workforces and stringent regulatory guidelines are driving companies in this space to look for transformational sourcing options that will help them deliver superior business performance and enhanced customer experience. With the increase in asset costs, many utilities clients are investing in technologies that prolong asset life and optimize utilization. For example, they are using predictive analytics to decrease downtime by proactively undertaking repairs. They are seeking providers that demonstrate deep industry expertise, strong digital technologies and innovation capabilities in this sector.

This Utilities Industry – Services and Solutions 2021 study is aimed at understanding the requirements of utilities companies for the digital age and assessing service provider capabilities in this space.

Scope of the Report

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.

Definition (cont.)

For this reason, ISG's report on the utilities industry is comprised of multiple quadrants covering a spectrum of services and solutions that a utilities client requires.

The quadrants descriptions are as follows:

Intelligent Business Process Management (iBPM) Services: This quadrant assesses business process outsourcing (BPO) providers that offer a range of BPM services to utilities companies. These include 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.

Next-Gen IT Services – Large Accounts: This quadrant covers 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 large utilities clients across the value chain that may include emerging technologies such as automation, analytics and AI and the Internet of Things (IoT). Large utilities clients generally have more than 750,000 customers, over 5,000 employees and revenues of more than US\$2 billion.

Next-Gen IT Services – Midmarket: This quadrant assesses providers that offer IT managed services, including ADM services, infrastructure services (data center, cloud, network, workplace and security) and systems integration services (including new application development) to midmarket utilities clients across the value chain that may include emerging technologies such as automation, analytics, AI and IoT. These clients generally have fewer than 750,000 customers, under 5,000 employees and generate less than US\$2 billion in revenue. They also may have fewer complex requirements and a lower project scale than large enterprises.

Definition (cont.)

Digital Transformation Services and Solutions – Large Accounts: This quadrant is focused on service providers (IT, BPO and/or consulting) that help large utilities companies to assess, design, build, run and accelerate their digital transformation initiatives. Large utilities clients generally have more than 750,000 customers, over 5,000 employees and revenues of more than US\$2 billion. This quadrant also assess providers based on their capability to innovate, leverage emerging technologies, transform business processes and provide proprietary platform-based solutions.

Digital Transformation Services and Solutions – Midmarket: This quadrant covers service providers (IT, BPO and/or consulting) that help midmarket utilities companies to assess, design, build, run and accelerate their digital transformation initiatives. It also assesses them based on their capability to innovate, leverage emerging technologies, transform business processes and provide proprietary platform-based solutions. Midmarket utilities clients generally have fewer than 750,000 customers, under 5,000 employees and generate less than US\$2 billion in revenue. They also have fewer complex requirements and a lower project scale than those of large enterprises.



Provider Classifications

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly.

Leader

The Leaders among the vendors/providers have a highly attractive product and service offering and a very strong market and competitive position; they fulfill all requirements for successful market cultivation. They can be regarded as opinion leaders, providing strategic impulses to the market. They also ensure innovative strength and stability.

Product Challenger

The Product Challengers offer a product and service portfolio that provides an above-average coverage of corporate requirements, but are not able to provide the same resources and strengths as the Leaders regarding the individual market cultivation categories. Often, this is due to the respective vendor's size or weak footprint within the respective target segment.

Market Challenger

Market Challengers are also very competitive, but there is still significant portfolio potential and they clearly fall behind the Leaders. Often, the Market Challengers are established vendors that are somewhat slow to address new trends due to their size and company structure, and therefore have some potential to optimize their portfolio and increase their attractiveness.

Contender

Contenders still lack mature products and services or sufficient depth and breadth in their offering, but also show some strengths and improvement potential in their market cultivation efforts. These vendors are often generalists or niche players.

Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has 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).

Rising Star

Companies that receive the Rising Star award have a promising portfolio 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. This award is only given to vendors or service providers that have made significant progress toward their goals in the last 12 months and are expected to reach the Leader quadrant within the next 12-24 months due to their above-average impact and strength for innovation.

Not In

The service provider or vendor was not included in this quadrant. There might be one or several reasons why this designation is applied: 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 qualify due to market share, revenue, delivery capacity, number of customers or other metrics of scale to be directly compared with other providers in the quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer this service or solution, or confer any other meaning.

Utilities Industry - Services and Solutions - Quadrant Provider Listing 1 of 3

	Digital Transformation Services and Solutions - Large Accounts	Digital Transformation Services and Solutions - Midmarket	Intelligent Business Process Management Services	Next-Gen IT Services - Large Accounts	Next-Gen IT Services - Midmarket
Accenture	● Leader	● Not in	● Leader	● Leader	● Not in
Alorica	● Not in	● Not in	● Leader	● Not in	● Not in
Atos	● Leader	● Not in	● Product Challenger	● Leader	● Not in
Birlasoft	● Product Challenger	● Leader	● Not in	● Product Challenger	● Leader
Capgemini	● Leader	● Not in	● Leader	● Leader	● Not in
CGI	● Leader	● Not in	● Not in	● Leader	● Not in
Cognizant	● Leader	● Not in	● Leader	● Leader	● Not in
Concentrix	● Not in	● Not in	● Product Challenger	● Not in	● Not in
Conduent	● Not in	● Not in	● Rising Star	● Not in	● Not in
CSS	● Not in	● Not in	● Product Challenger	● Not in	● Not in
Deloitte	● Product Challenger	● Not in	● Not in	● Not in	● Not in
DXC	● Product Challenger	● Not in	● Market Challenger	● Product Challenger	● Not in
Exela	● Not in	● Not in	● Product Challenger	● Not in	● Not in

Utilities Industry - Services and Solutions - Quadrant Provider Listing 2 of 3

	Digital Transformation Services and Solutions - Large Accounts	Digital Transformation Services and Solutions - Midmarket	Intelligent Business Process Management Services	Next-Gen IT Services - Large Accounts	Next-Gen IT Services - Midmarket
EXL	● Product Challenger	● Leader	● Leader	● Not in	● Not in
Firstsource	● Not in	● Not in	● Contender	● Not in	● Not in
Fujitsu	● Product Challenger	● Not in	● Not in	● Product Challenger	● Not in
GTCSYS	● Contender	● Contender	● Not in	● Contender	● Contender
HCL	● Leader	● Not in	● Not in	● Leader	● Not in
IBM	● Leader	● Not in	● Leader	● Leader	● Not in
Infosys	● Leader	● Not in	● Leader	● Leader	● Not in
LTI	● Product Challenger	● Leader	● Not in	● Product Challenger	● Leader
Mphasis	● Product Challenger	● Product Challenger	● Not in	● Product Challenger	● Product Challenger
NTT DATA	● Market Challenger	● Not in	● Market Challenger	● Market Challenger	● Not in
Sitel	● Not in	● Not in	● Product Challenger	● Not in	● Not in
Softtek	● Product Challenger	● Product Challenger	● Not in	● Product Challenger	● Rising Star
Sonata Software	● Contender	● Contender	● Not in	● Contender	● Contender

Utilities Industry - Services and Solutions - Quadrant Provider Listing 3 of 3

	Digital Transformation Services and Solutions - Large Accounts	Digital Transformation Services and Solutions - Midmarket	Intelligent Business Process Management Services	Next-Gen IT Services - Large Accounts	Next-Gen IT Services - Midmarket
Sykes	● Not in	● Not in	● Product Challenger	● Not in	● Not in
TCS	● Leader	● Not in	● Leader	● Leader	● Not in
Tech Mahindra	● Product Challenger	● Leader	● Product Challenger	● Product Challenger	● Leader
Techwave	● Contender	● Contender	● Not in	● Contender	● Contender
Teleperformance	● Product Challenger	● Not in	● Leader	● Not in	● Not in
TELUS International	● Not in	● Not in	● Contender	● Not in	● Not in
TTEC	● Not in	● Not in	● Contender	● Not in	● Not in
Wipro	● Leader	● Not in	● Leader	● Leader	● Not in
WNS	● Product Challenger	● Leader	● Leader	● Not in	● Not in
YASH Technologies	● Contender	● Product Challenger	● Not in	● Contender	● Product Challenger
Zensar	● Contender	● Contender	● Not in	● Contender	● Contender



Utilities Industry - Services and Solutions Quadrants

ENTERPRISE CONTEXT

Intelligent Business Process Management Services

This report is relevant to enterprises in the utilities industry in North America for evaluating providers of intelligent business process services.

In this quadrant report, ISG highlights the current market positioning of providers that offer intelligent business process management (iBPM) services to utilities companies in North America and how they address the key challenges faced in the region.

Utilities companies in the region are constantly challenged to offer an enhanced customer service while reducing costs for clients. A new breed of entrants with digitally enabled business models and reduced cost of operations are offering cheaper services compared to traditional utilities companies. Moreover, the ongoing pandemic is forcing companies to build increasingly resilient operations where the adoption of digital to bolster revenue, reduce costs, serve and minimize customer churn has become imperative.

Service providers that offer intelligent business process services in North America are helping clients deploy advanced analytics to anticipate customer needs and improve their experience while investing in digital technologies to enhance their call center performance. To keep pace with newer entrants in the market, utilities companies are investing in digital tools and platforms. As delivering an exceptional customer experience requires a shift from the traditional siloed operating model to an integrated front and back, utilities companies are leveraging connected provider platforms to optimize their business processes and offer a seamless, integrated and omnichannel customer experience.

Line of business leaders (LOBs) should read this report to understand the relative positioning and capabilities of providers that offer end-to-end iBPM services to deliver higher efficiency and effectiveness. The report also highlights their technical and integration capabilities as well as their strategic partnerships.

IT and technology leaders should read this report to understand how iBPM service providers are integrating multiple technologies into their proprietary offerings and compare their technical capabilities with the rest of the market.

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

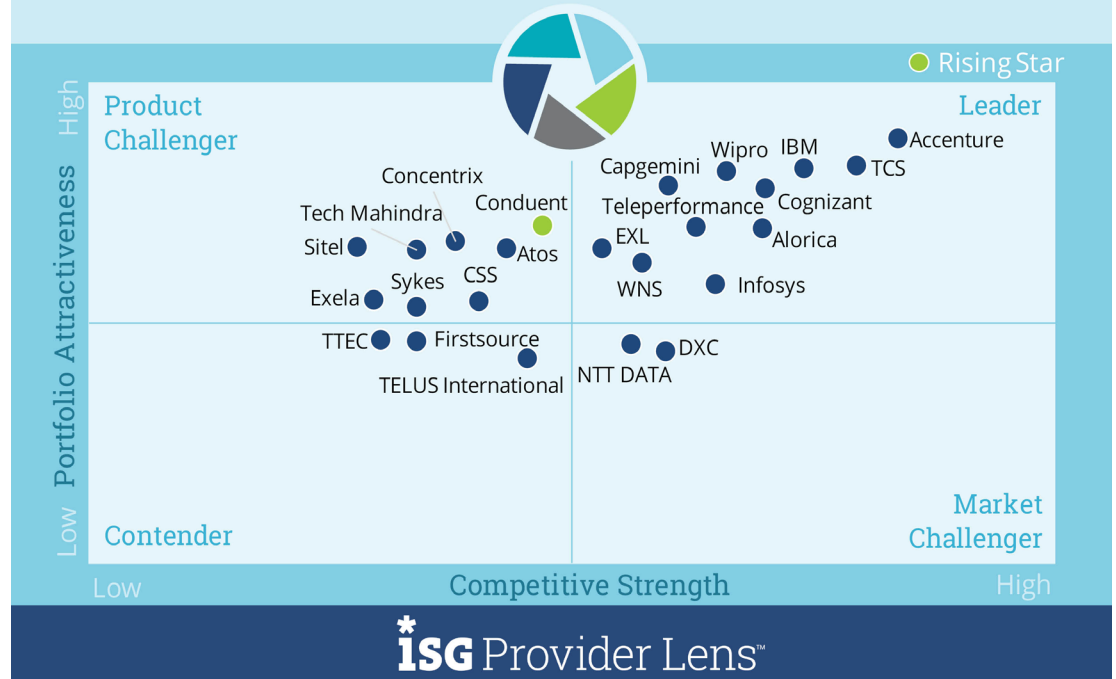
INTELLIGENT BUSINESS PROCESS MANAGEMENT SERVICES

Definition

This quadrant assesses business process outsourcing (BPO) providers that offer a range of BPM services to utilities companies. These include 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 provider to understand the domain and industry specifics, but also the expectations of utilities companies in terms of their active use of automation and analytics. The services are aimed at helping companies reduce inefficiencies both on 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.

Utilities Industry - Services and Solutions Intelligent Business Process Management Services

2021
North America



Source: ISG Research 2021

INTELLIGENT BUSINESS PROCESS MANAGEMENT SERVICES

Eligibility Criteria

Service providers must:

- Offer the above-mentioned BPM services to utilities companies in one or more areas across the value chain, with local expertise in the assessed region

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, IoT, 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

Observations

- **Accenture** has a full suite of operations capabilities and an extensive partner ecosystem to provide intelligent utilities BPM services to clients and help them achieve revenue gain and cost reduction across the value chain.
- **Alorica's** flexible and refined customer care capabilities help regulated utilities and deregulated energy suppliers drive operational efficiency. Its services also help them adhere to regulatory requirements and deliver exceptional service to customers.
- **Capgemini's** business services redefine business operations for the digital agenda, enabling utilities clients to become cost effective, nurture talent, enhance controls and grow their businesses rapidly.
- **Cognizant** is among the leading providers of digital solutions with its end-to-end utilities platforms that leverage automation and AI, helping clients to achieve a digital-first strategy.
- **EXL** is a trusted service delivery partner for utilities companies. It enables better business decisions and applies intelligence in operations through data-led value creation frameworks and cloud-native digital solutions.

INTELLIGENT BUSINESS PROCESS MANAGEMENT SERVICES

Observations (cont.)

- **IBM** has unique capabilities in the intelligent BPM services industry. Its services cover business process and technology advisory, implementation and managed business processes for hybrid cloud environments. The company's key differentiator is its ability to provide an end-to-end capability across software, hardware, cloud, implementation and management to clients.
- **Infosys** has invested significantly to strengthen its knowledge, services and industry relationships. The company and its clients benefit from multiple Infosys centers of excellence and its high-quality partners.
- **TCS** has extensive domain expertise and experience in serving utilities clients with business process services. The company leverages multiple proprietary platforms in operations and design to help clients achieve significant business outcomes.
- **Teleperformance's** digital integrated business services combine human touch and high technology to deliver superior customer experiences. The company has invested in multiple tools, technologies and platforms to not only enhance customer business outcomes, but also to help employees deliver exceptional services to clients.
- **Wipro** has a strong focus on helping utilities clients improve their performance and cost effectiveness. The company is actively deploying approaches to drive platformed and orchestrated enterprise digital architectures and capabilities that ensure availability and access to reliable data, prioritize the development of outcome-aligned use cases, and integrate digital solutions with business processes using automation and zero-touch change management.
- **WNS** offers end-to-end process solutions and a technology- and client-centric consultative approach for delivering excellence through analytics-driven engagements to help enterprise clients achieve transformational outcomes.
- **Conduent** (Rising Star) is a leading provider of diversified business process services with strong capabilities in transaction processing, automation and analytics. It provides industrial and energy solutions that help businesses to streamline, improve customer experience and remain competitive.

TCS

 Overview

Headquartered in Mumbai, India, TCS is one of the most valued IT services companies globally. The firm has close to 490,000 professionals across 46 countries, generating more than US\$22 billion in revenue. It has been strengthening its focus on the utilities industry, having established three utilities labs, a drone lab in Cincinnati, a customer experience lab in Santa Clara and a utilities CoE in Kolkata, India. More than 6,500 professionals work in utilities across nine global delivery centers.

 Strengths

Heavy focus on North America: TCS Utilities Services' revenue from North America has grown approximately tenfold in the last eight years. The company currently has 21 active utilities clients in the region, which are served by more than 3,700 employees. One third of the employees are involved in the BPM practice. More than 40 percent of the company's industry revenue comes from North America.

Industry-specific services and solutions: TCS has invested significantly in research and innovation in the utilities industry. It is the only service provider to have two dedicated centers in the U.S. for nuclear compliance-related work and serves six nuclear clients in the region. The company offers numerous proprietary products in this space. Some of these include IP2™, an intelligent power plant solution that enhances power generation with digital twins, Machine Vision that uses AI imaging sensors for identification and detection, and TCUP that provides end-to-end solutions for electric vehicle ecosystems.

Digital solutions and platforms: TCS' Cognitive Business Operations (CBO) helps utilities clients reimagine business operations by leveraging cognitive technologies. It takes advantage of the proprietary Machine First Delivery Model (MFD™) and Ignio™ platform to automate business operations while leveraging the company's wider partner ecosystem. TCS Cognix™, powered by MFD™, orchestrates multiple technologies, platform solutions, process benchmarking and service transformation frameworks to help enterprises embrace a culture of continuous innovation. The TCS Trapeze™ framework encompasses practices and tools that help more than 3,000 business process services customers stay ahead of the competition by ensuring efficient operations, knowledge impartment and change management while digitizing a large portion of their enterprise operations.

 Caution

TCS is a strong player in the iBPM market in North America primarily catering to large and multinational clients. The company could focus on expanding its footprint among fast-growing mid-sized utility companies.



2021 ISG Provider Lens™ Leader

TCS, a leader in the BPM market in the U.S. provides services across the utilities value chain through the Machine First™ approach that integrates multiple technologies with the partner ecosystem. The company has invested in dedicated utilities innovation labs that are focused on conceptualizing solutions. Its Co-Innovation Network (COIN™) leverages the startup ecosystem to develop innovative solutions.

ENTERPRISE CONTEXT

Next-Gen IT Services – Large Accounts

This report is relevant to enterprises in the 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 utilities companies in North America and how they address the key challenges faced in the region.

The rapid adoption of renewables, storage and distributed energy resources (DER) is impacting the traditional operating rhythm of transmission and distribution companies as well as system operators. Utilities companies in North America are seeking more adaptable and sophisticated capabilities for supply and demand forecasting, grid inertia assessments, network modelling and optimization, automated demand response, situational awareness and advanced training tools. In recent years, these companies have built digital and data capabilities within their organizations, but piecemeal and disjointed digital solutions have not adequately delivered business outcomes.

Service providers are deploying data management and data science capabilities, while working with partners to develop advanced operational capabilities for utilities companies. These companies expect them to build future-resilient applications and infrastructure systems and solidify their technical/digital foundation to help transform grid operations, digitally enable the utilities workforce, and improve customer experience through various digital channels.

Line of business leaders (LOBs) should read this report to understand the relative positioning and capabilities of providers that offer end-to-end 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.

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

Sourcing and vendor management professionals should read this report to understand the provider ecosystem for next-generation IT solutions and services in North America and gain insights into how providers compare to one another.

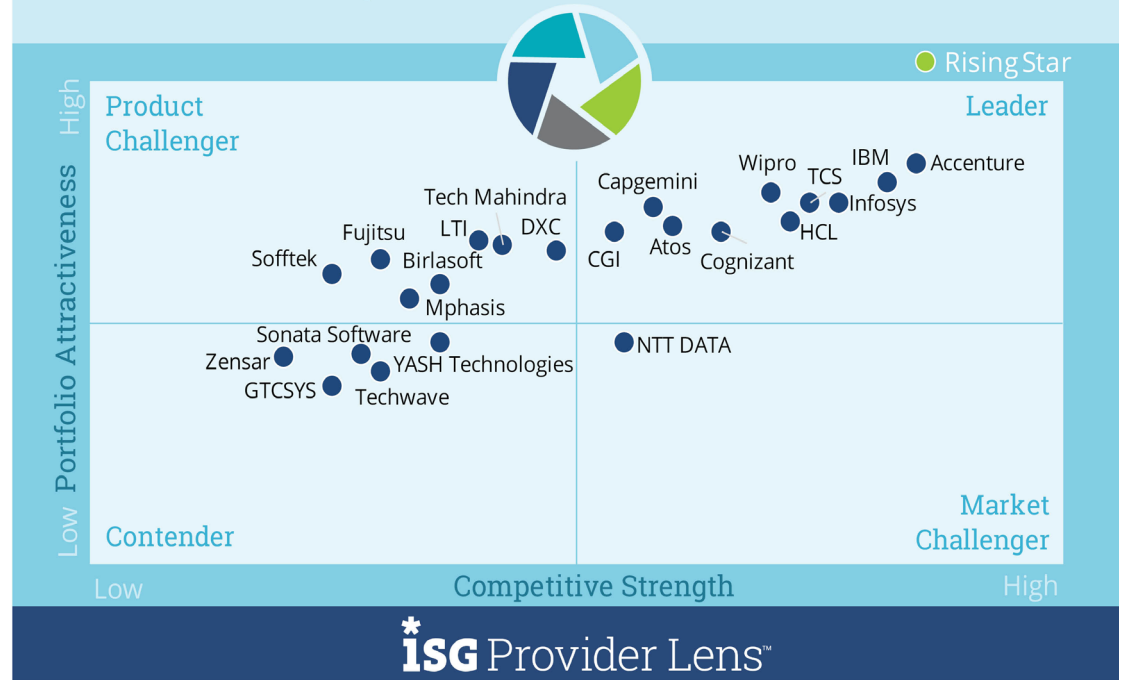
NEXT-GEN IT SERVICES – LARGE ACCOUNTS

Definition

This quadrant assesses 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 large utilities clients across the value chain that may include emerging technologies such as automation, analytics and AI and IoT. Large utilities clients typically have more than 750,000 customers, over 5,000 employees and revenues of more than US\$2 billion. The services are aimed at enabling utilities companies to increase productivity and efficiency, ensure compliance, minimize costs, optimize assets and maximize customer satisfaction.

Utilities Industry - Services and Solutions Next-Gen IT Services - Large Accounts

2021
North America



Source: ISG Research 2021

NEXT-GEN IT SERVICES – LARGE ACCOUNTS

Eligibility Criteria

Service providers must:

- Provide the above-mentioned IT services to utilities companies in one or more areas across the value chain, with local expertise in the assessed region

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 associations, regulatory bodies, technology firms and startups in the utilities industry
- Experience in large transition projects that include merged companies and modernization of systems and applications in the industry
- Referenceable utilities case studies

Observations

- **Accenture's** deep industry expertise and comprehensive portfolio of next-generation IT services transform utilities clients across the value chain. It also helps them to reimagine IT at speed and scale to drive exponential efficiencies.
- **Atos** has deep industry-specific knowhow across the power, water and gas value chains, spanning from production and distribution to transportation and retail services. Through its Codex portfolio of business-driven analytics, IoT and AI solutions, the company provides energy and utilities companies with the skills, capabilities and technologies necessary to build new data-driven services and drive innovation, while meeting stringent security and regulatory requirements.
- **Capgemini** has extensive experience in providing consulting, technology services and digital transformation for energy and utilities clients. It offers a flexible infrastructure and cost-to-benefit advantage.
- **CGI** has executed numerous systems integrations and managed IT services projects for some of the world's largest utilities for more than three decades in the industry and region.
- **Cognizant** offers robust next-generation IT delivery capabilities along with automation, AI, IoT, cloud and an analytics portfolio of services for the utilities industry. Given its well-designed services, the company is a technology partner of choice for utilities companies that seek breadth of experience and a reliable delivery track record.

NEXT-GEN IT SERVICES – LARGE ACCOUNTS

Observations

- **HCL** has witnessed double-digit revenue and client growth in the energy and utilities industry, where it delivers diverse services across transformation, engineering services and infrastructure application services.
- **IBM's** end-to-end capability of providing software, hardware, cloud, implementation and management in a comprehensive commitment to utilities companies is a key differentiator. This approach gives it the ability to manage OpEx and capex requirements and business outcomes across the entire technology stack in a single contract.
- **Infosys** combines its strong utilities domain knowledge with proprietary platforms such as LEAP, Nia™ and Polycloud, plus a robust partnership ecosystem to help energy and utilities clients modernize and transform their IT landscape across the enterprise.
- **TCS** is known for its client centricity and has logged substantial growth in utilities revenue and clients in North America. It empowers several leading companies in this sector to build, innovate and master purpose-led transformation and growth.
- **Wipro's** depth and breadth in IT infrastructure and cloud technologies make it a preferred partner for many utilities companies in their digital transformation journeys. The company has proprietary tools and technologies, a comprehensive partner ecosystem, proficiencies in emerging technologies such as software-defined everything, open source, DevOps and IoT, making it a one-stop shop for all cloud and IT infrastructure needs of utilities companies.

TCS

 Overview

Headquartered in Mumbai, India, TCS is a consulting and IT services provider with 488,649 employees and annual revenues of US\$22 billion. Its utilities business division is part of the “Others” industry vertical, of which utilities had a revenue share of 16.5 percent in FY2020. The company partners with more than 100 energy and utilities companies across the globe, half of which are in North America.

 Strengths

Strong market presence: With nearly three decades of experience in the utilities industry, TCS is a mature and credible service provider that serves 10 of the top 25 Fortune 500 utilities companies. The company has a strong presence in the U.S. and has been delivering an integrated suite of IT services and solutions across the electricity, gas, and water utilities value chain. It partners with more than 50 energy and utilities companies in the U.S., supporting more than 35 million electricity consumers and 10 million gas consumers.

Skilled local expertise: TCS has experienced resources in North America, with 70 percent of its staff for the sector having more than five years of experience in delivering next-generation IT services to energy and utilities clients. This enables the company to deliver IT transformation projects at scale and has strengthened its growth trajectory in the region.

Delivering intense efficiency and effectiveness benefits: TCS modernized the legacy customer applications for a Canadian utilities company. The program resulted in notable benefits for the client, including a 66 percent reduction in operating expenses, 98 percent billing accuracy and 50 percent reduction in the billing cycle.

 Caution

Although TCS provides a robust next-generation IT services portfolio, it should increase the visibility of its services for energy and utilities clients to understand the length and breadth of its capabilities.



2021 ISG Provider Lens™ Leader

TCS has a strong vision for digital utilities with end customers at the core. It has also made significant investments in the proprietary Machine First Delivery Model (MFDM™), automation and cloud capabilities, partner ecosystem and people skills. These aspects have helped the company establish a leadership position in North America.

ENTERPRISE CONTEXT

Next-Gen IT Services – Midmarket

This report is relevant to midmarket enterprises in the 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 midmarket utilities companies in North America and how they address the key challenges faced in the region.

The adoption of cloud-based solutions is gaining traction in the utilities industry. These solutions tend to enable greater continuity of operations and better customer service while ensuring workforce health and safety. However, utilities companies face unique challenges in adopting cloud-based solutions. Specifically, subscription costs from cloud service providers have traditionally been categorized as operations and maintenance (O&M) expenses, for which on-premises software licenses can be capitalized. Given the incentives for minimizing O&M and maximizing capital, regulated utilities face financial disincentives while leveraging some of the most advanced, cloud-based solutions.

Multiple leading next-generation IT service providers are addressing this challenge by building assets based on cloud technologies that can be capitalized by utilities companies. These companies are increasingly looking for vendors that can bring a strategic impact and transformational ideas to the table instead of the regular cost take-out proposition.

Providers are engaging in key transformational deals with IT solution partners to drive operational efficiency. They are also working closely with utilities clients on the capitalization of cloud assets to increase operational efficiencies and leverage the rate case approvals. This is expected to be a major trend in the coming years.

Line of business leaders (LOBs) should read this report to understand the relative positioning and capabilities of providers that offer end-to-end 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.

IT and technology leaders should read this report to understand how providers of next-generation IT services for the midmarket are integrating multiple technologies into their proprietary offerings and compare their technical capabilities with the rest of the market.

Sourcing and vendor management professionals should read this report to understand the provider ecosystem for next-generation IT solutions and services in the North America and gain insights into how providers compare to one another.

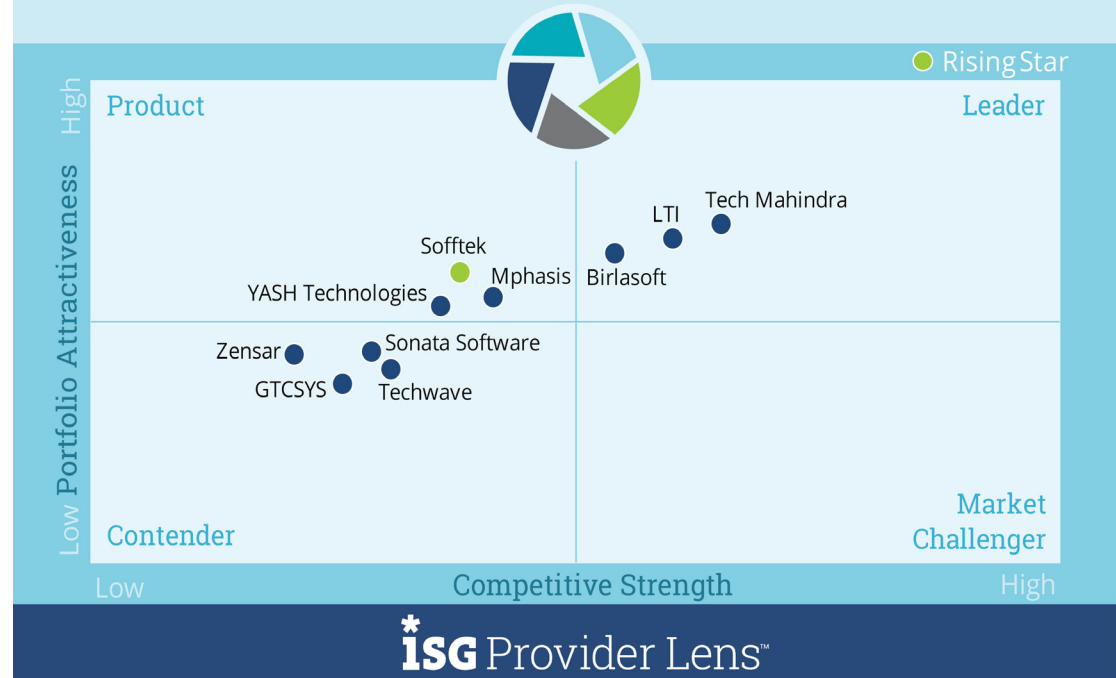
NEXT-GEN IT SERVICES – MIDMARKET

Definition

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 midmarket utilities clients across the value chain that may include emerging technologies such as automation, analytics, AI and IoT. These are aimed at enabling midmarket utilities companies to increase productivity and efficiency, ensure compliance, minimize costs, optimize assets and maximize customer satisfaction. These clients generally have fewer than 750,000 customers, under 5,000 employees 5,000 and generate less than US\$2 billion in revenue. They have fewer complex requirements and a lower project scale when compared to large enterprises.

Utilities Industry - Services and Solutions
Next-Gen IT Services - Midmarket

2021
North America



Source: ISG Research 2021

NEXT-GEN IT SERVICES – MIDMARKET

Eligibility Criteria

Service providers must:

- Provide the above-mentioned IT services to utilities companies in one or more areas across the value chain with local expertise in the assessed region
- Generate a minimum of 30 percent of their utilities-related next-generation IT services revenue from the midmarket segment in North America

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 associations, regulatory bodies, technology firms and startups in the utilities industry
- Experience in large transition projects that include merged companies and modernization of systems and applications in the utilities industry
- Referenceable case studies on utilities

NEXT-GEN IT SERVICES – MIDMARKET

Observations

- **Birlasoft** combines the power of domain, enterprise and digital technologies to reimagine business processes for clients and their ecosystems. It partners with leading technology providers and optimizes platform configurations to reduce in-house IT efforts and prepare the landscape for future transformation.
- **LTI** has multiple proprietary tools and a unique heritage from its parent company, giving it unrivaled real-world expertise to solve the most complex challenges faced by enterprises in the utilities industry.
- **Tech Mahindra** helps utilities companies enhance their business performance through its platform-enabled solutions that are powered by AI and automation. It is a leading network services provider and has been transforming and modernizing networks for more than 25 years, helping midmarket utilities clients to reimagine, reinvent and reshape the future of their business.
- **Softtek** (Rising Star) is the largest IT services company in Latin America and has close to 70 percent of its workforce in North and Central America.

ENTERPRISE CONTEXT

Digital Transformation Services and Solutions – Large Accounts

This report is relevant to enterprises in the utilities industry in North America for evaluating providers of digital transformation services.

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

Ageing infrastructure is one of biggest challenges faced by utilities companies. They often tend to delay modernizing their infrastructure systems until the legacy system is truly on its last legs. Efforts are now on for grid modernization in the U.S., which will attract significant investments during the next few years. At the same time, transforming the way electric vehicles (EVs) generate, store, manage and use energy increases the potential risks of cyberattacks and companies will need enhanced safety and surveillance systems. Utilities companies also face difficulties in modernizing their customer service infrastructure. Legacy utility customer information systems (CIS) and inflexible billing architecture are two key challenges and replacing them requires significant investments in terms of time, capital and organization energy.

With the rapid digitization and investments in modernizing grid, CIS systems and IT-OT systems, the utilities industry is seeing a higher number of digital transformation engagements compared to traditional IT managed services/BPM deals. Furthermore, digital transformation deals lean on single system integrators to provide end-to-end services, unlike in the past where there were multiple vendors engaged in different kinds of services for the same program. Utilities companies are usually looking for a single point of accountability with system integrators, seeking them to bring in a consortium of partners (as needed) to deliver end-to-end services.

Digital transformation professionals should read this report to assess providers of digital transformation solution and services that best fit the transformation initiatives of utilities companies and how they compare to one another.

IT and technology leaders should read this report to understand how providers of digital transformation services are integrating multiple technologies into their proprietary offerings and compare their technical capabilities with the rest of the market.

Sourcing and vendor management professionals should read this report to understand the provider ecosystem for digital transformation solutions and services in North America and gain insights into they compare to one another.

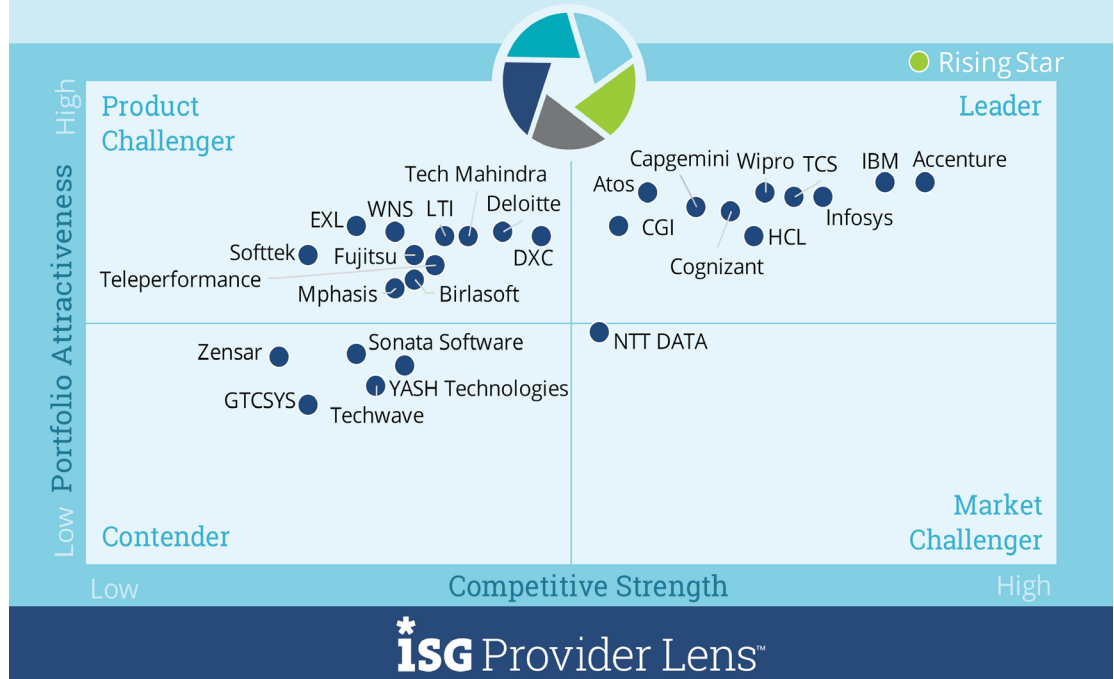
DIGITAL TRANSFORMATION SERVICES AND SOLUTIONS – LARGE ACCOUNTS

Definition

This quadrant assesses service providers (IT, BPO and/or consulting) that help large utilities companies to assess, design, build, run and accelerate their digital transformation initiatives. Large utilities clients typically have more than 750,000 customers, over 5,000 employees and revenues of greater than US\$2 billion. This section also evaluates providers based on their capability to innovate, leverage emerging technologies, transform business processes and provide proprietary platform-based solutions. These services are aimed at enabling utilities companies to enhance customer satisfaction, streamline operations, reduce costs and achieve greater efficiencies.

Utilities Industry - Services and Solutions
Digital Transformation Services and Solutions - Large Accounts

2021
North America



Source: ISG Research 2021

DIGITAL TRANSFORMATION SERVICES AND SOLUTIONS – LARGE ACCOUNTS

Eligibility Criteria

Service providers must:

- Offer digital transformation consulting services to help utilities clients formulate their digital roadmaps 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 win internal buy-in (for example, business case development 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 associations, regulatory bodies, technology firms and startups in the industry
- Referenceable case studies on utilities

DIGITAL TRANSFORMATION SERVICES AND SOLUTIONS – LARGE ACCOUNTS

Observations

- **Accenture** empowers utilities companies across the energy value chain to deliver 360-degree value for their business and stakeholders. It is also focused on driving outcomes that have a positive impact on the economy, society and planet.
- **Atos**, with its efficient automation, AI, analytics and IoT services portfolio, is a strong partner of choice for utilities clients to transform their digital transformation journeys.
- **Capgemini** delivers consulting services and solutions for digital transformation to 60 percent of the leading utilities companies. It helps them become customer centric and transform the way they run their internal organizations and the role of field workers, while driving down costs.
- **CGI's** end-to-end services portfolio across the utilities value chain and years of domain experience in the U.S. enable clients to realize significant annual savings on their digital transformation initiatives, thereby supporting overall cost optimization.
- **Cognizant** has a robust utilities client base in the U.S, comprising eight of the top 10 utilities companies in North America. Its digital-first approach to transformation, utilities-specific offerings and continued focus on expanding digital capabilities organically and inorganically make it a trusted partner for clients.
- **HCL** follows a pragmatic approach of understanding the needs, pain points and aspirations of utilities clients by undertaking a design thinking and business consulting exercise. Its key strength lies in enhancing the customer experience and reducing the total cost of operations by bringing in a suite of offerings across digital consulting, digital applications and platforms, data and analytics.
- **IBM** has a comprehensive portfolio of services and solutions fitted to the needs of energy and utilities companies. This, combined with its strategic R&D focus to assimilate innovation across each engagement, makes it a digital transformation leader in the utilities segment in North America.

DIGITAL TRANSFORMATION SERVICES AND SOLUTIONS – LARGE ACCOUNTS

Observations

- **Infosys** has been playing a key role in empowering utilities clients on their digital transformation journeys. It has a strong focus on continuously delivering operational efficiencies, enhancing the customer experience and providing innovation.
- **TCS**, by leveraging its Machine First Delivery Model (MFDM™) and consultative approach to digital transformation, has amplified human-machine collaboration to solve complex business problems and drive enterprise-wide transformation for its utilities clients.
- **Wipro** has a strong track record of executing more than 20 large-scale digital transformation programs for energy and utilities companies. It delivers business value and specific KPIs on customer experience, cost to serve, asset management and grid reliability, connected field employees and regulatory compliance.



TCS

 Overview

Tata Consultancy Services (TCS) is a large global IT services, consulting and business solutions provider headquartered in Mumbai, India. The company delivers digital transformation, strategy and business consulting services across the utilities value chain, from generation, transmission and distribution to retail. TCS says North America is the fastest-growing geography segment for its utilities business.

 Strengths

Machine-first approach to digital transformation: TCS assists utilities clients in their digital transformation journey by leveraging its Machine First Delivery Model (MFDM™) framework. This human-machine collaboration approach enables clients to deliver multi-fold productivity improvements and elevate the customer experience. The company was recently selected as the digital transformation partner by a large Fortune 500 utilities company in the U.S. to accelerate the adoption of automation, mobility and cloud by leveraging MFDM™ and the Business 4.0 framework.

Customer success references: TCS has a vast portfolio of client case studies on digital transformation for energy and utilities, delivering significant business outcomes in terms of cost reduction, effort optimization and improved productivity. These can be utilized as a springboard for future work, helping the company in expanding its client base. For one of the large vertically integrated electric utilities in the region, TCS provided a transformation solution with process standardization and automation deployment in an engagement that delivered approximately 30 percent efficiency improvement and US\$54 million in hard savings.

Enabling transformation with dedicated CoEs and innovation labs: TCS has a dedicated utilities-focused center of excellence that helps clients co-create next-generation digital solutions. It has also invested in innovation labs such as TCS Utilities Innovation & Transformation Group (ITG) and Co-Innovation Network (COIN™), which leverage the startup community to develop innovative solutions that are tailored to client-specific needs. This ensures agility in organizations' digital journeys and enables faster deployments.

 Caution

While TCS is one of the leading digital transformation services providers for utilities, there is potential for the company to grow its clientele and revenue base in the water utilities market in North America.



2021 ISG Provider Lens™ Leader

TCS's established presence and years of experience in the utilities industry, coupled with its comprehensive suite of services and solutions underpinned by MFDM™, has helped energy and utilities clients scale their digital transformation journeys and reap desired business outcomes.

ENTERPRISE CONTEXT

Digital Transformation Services and Solutions – Midmarket

This report is relevant to midmarket enterprises in the utilities industry in North America for evaluating providers of digital transformation services.

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

Mid-sized and smaller utilities companies face challenges in establishing and running extensive knowledge management programs as a large portion of their workforce retires every year. They also face intense competition from niche players, particularly in deregulated markets. Furthermore, they are under constant pressure from regulators to keep energy prices low and are losing market share to nimble, asset-light players. This has a direct impact on the profitability of their business.

With limited access to capital, mid-sized companies should carefully plan their digital transformation initiatives. They should choose the right solution that delivers consistent long-term growth and can be built in a much shorter span of time within the limited budget and available resources. Providers are collaborating with enterprise product vendors such as SAP and Oracle in the U.S. to create midmarket offerings that are pre-configured, out-of-box solutions with catalog-based pricing, offering a compelling value proposition

and an attractive price point to mid-sized utilities companies. They are also helping clients to virtualize the infrastructure, re-distribute work locations, and provide bot-based automation to eliminate costs and remain competitive.

Utilities in general is a highly conservative sector. Enabling transformational change in such risk-averse companies can be challenging. If transformational programs do not invest sufficiently in training and organizational change management initiatives, resistance to change among the workforce can inhibit the realization of promised business benefits.

Digital transformation professionals should read this report to assess providers of digital transformation solutions and services that best fit the transformation initiatives of midmarket utilities companies and how they compare to one another.

IT and technology leaders should read this report to understand how providers of digital transformation services are integrating multiple technologies into their proprietary offerings and compare their technical capabilities with the rest of the market.

Sourcing and vendor management professionals should read this report to understand the provider ecosystem for digital transformation solutions and services in the utilities industry in North America and gain insights into they compare to one another.

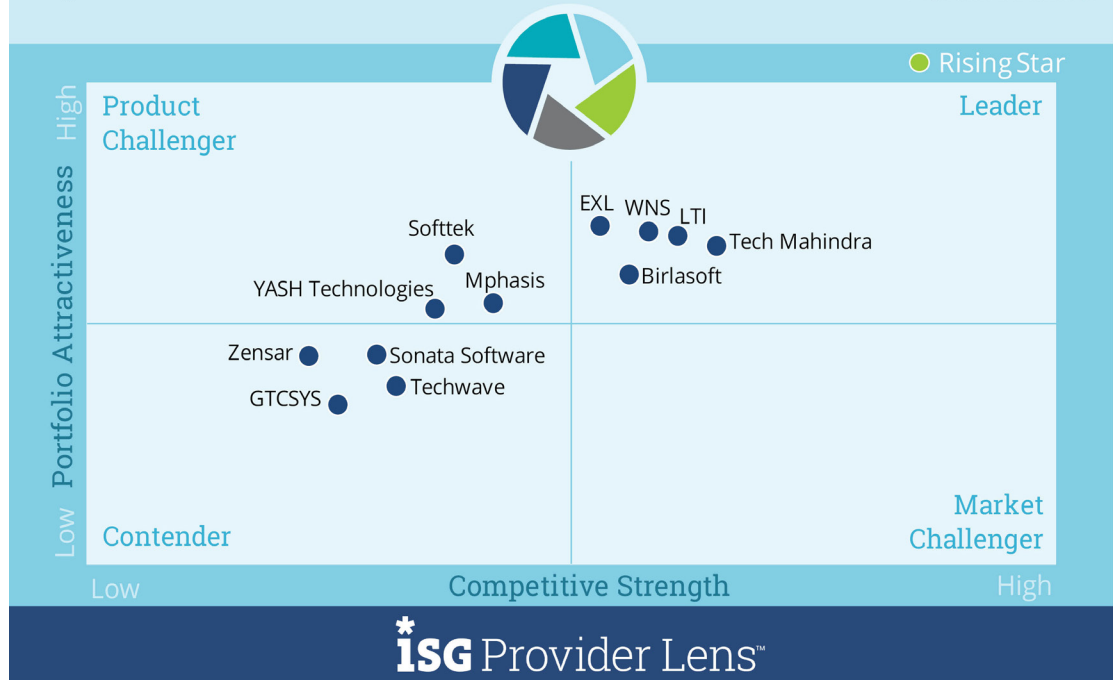
DIGITAL TRANSFORMATION SERVICES AND SOLUTIONS – MIDMARKET

Definition

This quadrant assesses service providers (IT, BPO and/or consulting) that help midmarket utilities companies to assess, design, build, run and accelerate their digital transformation initiatives. It also evaluates them based on their capability to innovate, leverage emerging technologies, transform business processes and provide proprietary platform-based solutions. These services are aimed at enabling utilities companies to enhance customer satisfaction, streamline operations, reduce costs and achieve greater efficiencies. Midmarket utilities clients generally have fewer than 750,000 customers, under 5,000 employees and generate less than US\$2 billion in revenue. They also have fewer complex requirements and lower project scale compared to large enterprises.

Utilities Industry - Services and Solutions
Digital Transformation Services and Solutions - Midmarket

2021
North America



Source: ISG Research 2021

DIGITAL TRANSFORMATION SERVICES AND SOLUTIONS – MIDMARKET

Eligibility Criteria

Service providers must:

- Provide digital transformation consulting services to help utilities clients in formulating their digital roadmaps and build short- and long-term digital strategies
- Offer advice and guidance on process optimization to deliver tangible benefits
- Generate a minimum of 30 percent of their digital transformation services revenue in North America from the utilities midmarket segment

Observations

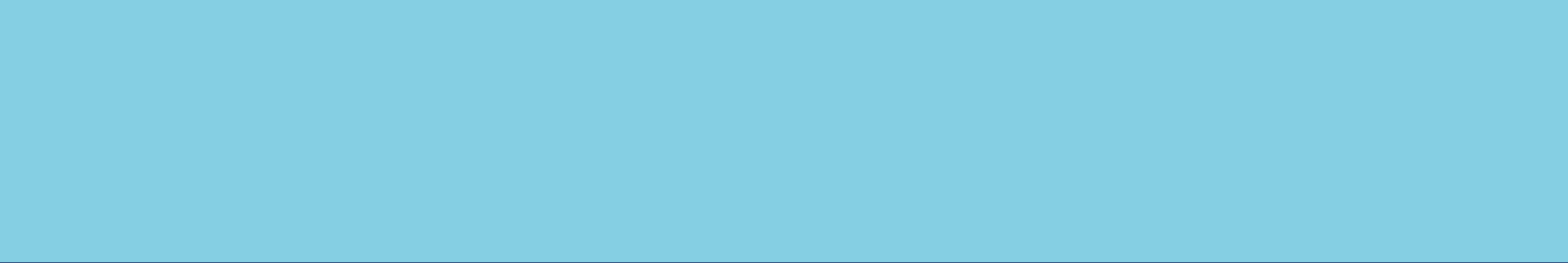
Service providers should have:

- Strong consulting and change management capabilities to help utilities companies win internal buy-in (for example, business case development 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 associations, regulatory bodies, technology firms and startups in the industry
- Referenceable case studies on utilities

DIGITAL TRANSFORMATION SERVICES AND SOLUTIONS – MIDMARKET

Observations

- **Birlasoft** brings a multidisciplinary approach synchronizing people, process and technology to deliver benefits across the entire value chain for regulated and deregulated utilities companies.
- **EXL** has extensive industry knowledge and proven domain expertise in the utilities industry. It has developed several digital solutions to accelerate end-to-end digital transformation across data-driven business processes for the sector.
- **LTI** offers the Utility Business Assurance Framework (UBAF), which helps utilities clients transform their assurance journey with a strong focus on driving business outcomes.
- **Tech Mahindra** has built on its success in digital transformation internally to offer best-in-class and innovative solutions to utilities clients.
- **WNS** has strong vertical expertise and proactive investments in partnerships, proprietary tools, digital automation and embedded analytics at the core of its service delivery to support energy and utilities clients in their digital transformation journeys.



Methodology



METHODOLOGY

The research study ISG Provider Lens™ 2021 – "Utilities Industry - Services and Solutions" analyzes the relevant 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. The study was divided into the following steps:



1. Definition of Utilities Industry - 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 and use cases;
4. Leverage ISG's internal databases and advisor knowledge and experience (wherever applicable);
5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and other sources;
6. Use of the following key evaluation criteria:
 - Strategy & vision;
 - Innovation;
 - Brand awareness and presence in the market;
 - Sales and partner landscape;
 - Breadth and depth of portfolio of services offered;
 - Technology advancements.

Author and Editor



Amar Changulani, Author
Senior Lead Analyst

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Author and Editor



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Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With more than 35 years of experience, he is highly skilled at analysing 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, Partner and Global Head - ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

ISG Provider Lens™ | Utilities Industry - Services and Solutions

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