

Power and Utilities – Services and Solutions

A research report comparing provider strengths,
challenges and competitive differentiators



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Australia is transitioning from one of the largest fossil fuel generators to a renewable energy leader

The utilities industry of Australia is facing a scarcity of resources due to a spike in population, mass urbanisation and changing weather conditions. These challenges are further elevated by the dynamic changes in the regulatory landscape of the country. Consumers, especially mid-income and low-income citizens, are also facing different challenges, including the increasing cost of living and high energy costs. Furthermore, the Amazon effect has increased the expectation from utilities by many folds, and customers expect superior CX coupled with self-service omnichannel support and personalised advice to manage energy consumption on their premises.

Utilities were not keen on addressing challenges due to their high resistance to

change and slow adoption of technologies. However, they are now proactive to regulatory changes and customer and market needs. At the same time, technology adoption is forming the next wave of disruption in the utilities industry. The industry is undergoing large-scale digital transformation, with a focus on investing in AI, IoT, data analytics and automation. Utilities' operation leaders are focusing on the efficient delivery of products and services using sustainably low-cost methods.

ISG, as an advisor that has helped several globally leading utilities navigate their digital transformation, believes that building a successful, competitive and future-proof utilities business requires a focus on strengthening the technological and digital foundation, transforming grid operations, continuously improving cybersecurity, digitally enabling the workforce and improving CX through digital channels. Some of the key trends in the Australian power and utilities market are mentioned below:

Energy transition seems to be the most viable solution for Australian utilities' challenges.



Digital transformation is now a need, not a choice

Australia is one of the most urbanised countries in the world, and 80 percent of its population lives in urban areas. The electricity, water and wastewater management segments are under constant pressure to improve and invest in digital solutions to meet the demands of its growing urban population and become resilient to weather disruptions. Data analytics and ML are identified as the technologies that are being adopted the most to improve power and utilities operations in the country. Half of the electricity retailers in the country believe that ML and analytics can help them improve customer-facing systems, which can enhance CX and reduce the customer churn rate.

Pacing towards energy transition

Australia's geographic location, favourable weather conditions (sunny and windy) and low population density support its aim to become a global leader in sustainable energy. Currently, Australia relies on coal as the primary source to generate electricity. In 2022, the country produced 85 percent of its electricity from coal,

followed by wind (6 percent), hydroelectric energy (3 percent) and solar energy (3 percent). In 2020, Australian Energy Market Operator (AEMO) announced a plan to generate 90 percent of electricity from renewable sources by 2035. Furthermore, the Australian government has announced that it will not allow the operation of gas and coal generators after the retirement date and may plan to decommission them earlier if the country is able to achieve cost benefits from renewable energy sources. The regulatory push has spiked the investment in renewable energy projects and generated \$4.3 billion in just Q4 2022, which is 10 times higher than that of the previous quarter of the same year.

Rise of electric mobility

Australia is one of the largest per capita carbon emitters in the world, and transport is the third-largest source of carbon emission in the country. Electric vehicle (EV) sales were 3.8 percent of the total car sales in 2022, which indicated a lower number compared with that of other developed nations. In April 2023, the country unveiled its electric vehicle strategy aimed at increasing the penetration of electric

vehicles in the country. The Australian federal government has also announced plans to invest \$70 million in grant funding for charging infrastructure, which will be administered through the Australian Renewable Energy Agency (ARENA). As the number of EVs and charging facilities grows, electricity demand will increase, which needs robust planning of power grids' capacities to meet the demand for electricity. Recently, South Australia started vehicle-to-grid (V2G) bi-directional charging pilot projects, allowing electric car owners to get paid for feeding unused energy stored in EV battery back into the grid

Rising cost of electricity

Post-COVID-19 inflation has resulted in a steep increase in the cost of electricity. According to a survey by the Australian Council of Social Services and AEMO, people who belong to the low-income category are compelled to take extreme measures to balance the usage of energy. For instance, 65 percent are cutting down on heating and cooling; 59 percent are limiting the use of lights, and almost 60 percent are going without essentials to afford bills. In 2022, there was a 15 percent increase in the

number of customers participating in energy hardship programs, with half of them unable to meet current energy costs and the number with energy debts above \$2,500 rising to 39 percent.

Increase in employee care to bridge the talent gap

As warned by the Australian Clean Energy Council, Australia's renewable energy projects can be stalled as it may face a shortage of around 12,000 skilled professionals. Traditional utilities are also facing staffing issues, which makes it difficult for them to meet business challenges like sustainability and cybersecurity. Aiming at bridging the talent gap and creating a more sustainable world, utilities are rethinking how to position themselves as technology innovators and create job opportunities in the areas of renewable energy and cybersecurity. Numerous utilities also have enhanced the mental health benefits and learning and development opportunities offered to employees. Easy-to-use technology that delivers value is extremely important to enhancing employee experiences for both office and field workers.



Regulatory push to improve cybersecurity

Cybersecurity has become one of the major needs for the utilities and government sectors, as even a small cyberattack can disrupt the necessary public and private operations and can result in a bigger threat to the social and financial stability of a country. To ensure the cybersecurity of critical infrastructure, the Australian government launched Critical Infrastructure Risk Management Program Rules 2023 (CIRMP Rules). These rules state that entities responsible for handling critical infrastructure have six months to ensure they have a risk management program that adequately addresses all hazards, including in four key risk areas: cyber, personnel, supply chain and physical security.

Rise of microgrids

Australia is a vast country with low population density and extreme weather conditions. Therefore, developing and maintaining transmission and distribution infrastructure is difficult and expensive. One of the solutions to this problem is the development of microgrids for remote areas. These microgrids can use the power generated by renewable sources and can

be developed and maintained by local people. In 2021, ARENA announced the launch of the \$33 million Regional Australia Microgrid Pilots Program (RAMPP) to support microgrid pilot projects across Regional Australia. Recently Kalbarri, a Western Australian coastal town, has completed the development of the state's largest fully functional microgrid. It is powered entirely by renewable energy solutions, utilising rooftop solar and wind generation coupled with battery storage.

Energy trading infrastructure upgrade

In July 2021, AEMO transitioned the Australian electricity market settlement time from 30 minutes to five minutes. The new settlement period will take care of the growing share of renewable energy and distributed energy resources (DERs) and provide more flexibility to adjust to the increasing demand and supply variability. It will also improve price signals for efficient investment capacity and demand response technologies. The new settlement regime will generate an immense amount of data necessary for analytics, intelligence and demand forecasting.

The regulatory push in Australia to increase the renewable energy mix, DERs and EV charging infrastructure will bring investments in grid infrastructure, digital transformation, AI, analytics and cybersecurity technologies, and CX solutions.



Provider Positioning

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	Intelligent Business Process Management Services (iBPMS)	Next-Gen IT Services	Grid Modernization	Enterprise Asset Management (EAM)	Customer Information System (CIS) and Customer Experience (CX)
Accenture	Leader	Leader	Leader	Leader	Leader
Acquire BPO	Leader	Contender	Not In	Not In	Market Challenger
ARQ Group	Not In	Market Challenger	Not In	Not In	Not In
ASG	Not In	Market Challenger	Not In	Not In	Not In
Capgemini	Leader	Leader	Product Challenger	Leader	Leader
Cigniti	Not In	Contender	Not In	Not In	Not In
Coforge	Not In	Contender	Not In	Contender	Not In
Cognizant	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Cyient	Contender	Contender	Contender	Contender	Not In
Datacom	Market Challenger	Market Challenger	Not In	Not In	Market Challenger
DB Results	Not In	Contender	Not In	Not In	Not In




Provider Positioning

Page 2 of 3

	Intelligent Business Process Management Services (IBPMS)	Next-Gen IT Services	Grid Modernization	Enterprise Asset Management (EAM)	Customer Information System (CIS) and Customer Experience (CX)
DXC Technology	Contender	Product Challenger	Contender	Contender	Contender
EXL	Product Challenger	Not In	Not In	Not In	Product Challenger
Genpact	Product Challenger	Not In	Not In	Product Challenger	Not In
HCLTech	Product Challenger	Leader	Leader	Not In	Product Challenger
Hitachi Vantara	Not In	Not In	Product Challenger	Product Challenger	Not In
IBM	Leader	Leader	Product Challenger	Leader	Leader
Infosys	Leader	Leader	Leader	Leader	Leader
KPMG	Product Challenger	Not In	Not In	Not In	Not In
Kyndryl	Contender	Product Challenger	Contender	Contender	Contender
Probe CX	Market Challenger	Not In	Not In	Not In	Leader
PSC	Not In	Not In	Rising Star ★	Market Challenger	Not In



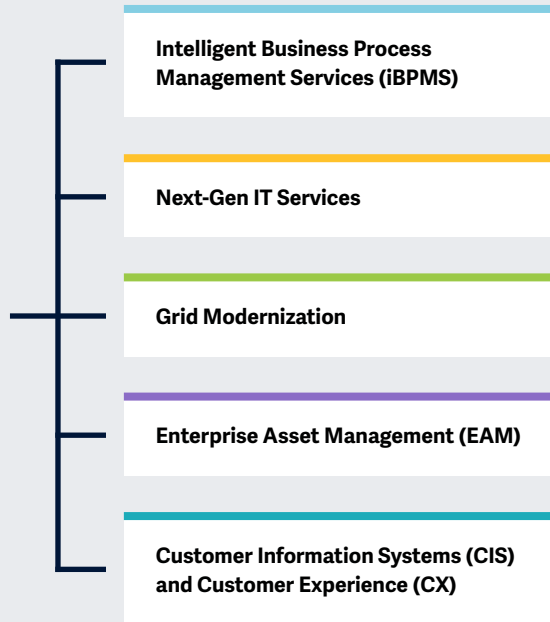
 Provider Positioning

	Intelligent Business Process Management Services (iBPMS)	Next-Gen IT Services	Grid Modernization	Enterprise Asset Management (EAM)	Customer Information System (CIS) and Customer Experience (CX)
PwC	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Serco	Not In	Not In	Not In	Not In	Contender
Startek	Contender	Not In	Not In	Not In	Contender
TCS	Leader	Leader	Leader	Leader	Leader
Tech Mahindra	Rising Star ★	Rising Star ★	Product Challenger	Product Challenger	Leader
Teleperformance	Product Challenger	Not In	Not In	Not In	Product Challenger
Wipro	Leader	Leader	Leader	Leader	Leader
WNS	Leader	Not In	Not In	Not In	Rising Star ★



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

Simplified Illustration; Source: ISG 2023



Definition

The global power and 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.



Scope of the Report

In this ISG Provider Lens™ quadrant report, ISG covers the following five quadrants for services/solutions: Intelligent Business Process Management Services (iBPMS), Next-Gen IT Services, Grid Modernization, Enterprise Asset Management (EAM), Customer Information Systems (CIS) and Customer Experience (CX).

This ISG Provider Lens™ study offers IT decision makers the following:

- Transparency on the strengths and weaknesses of relevant providers/software vendors
- A differentiated positioning of providers by segments (quadrants)
- Focus on the regional market

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

Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between \$20 million and \$999 million with central headquarters in the respective country, usually privately owned.

- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above \$1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product Challenger, Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include service providers that ISG believes have strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).





Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.





Intelligent Business Process Management Services (iBPMS)

Intelligent Business Process Management Services (iBPMS)

Who Should Read This Section

This report is relevant to enterprises in the power and utilities industry operating in Australia for evaluating providers of business process outsourcing (BPO) and business process management (BPM) services.

In the quadrant report, ISG highlights the current market positioning of providers that offer BPM/BPO services to power and utilities companies in Australia and how they address the key challenges faced in the region through technology and domain expertise.

For organisations undergoing digital transformation, agility is key to responding to a rapidly changing technology and business landscape. Power and utilities enterprises are facing steep challenges due to increased fuel prices and maintenance costs, regulatory pressure, capacity constraints, complex legacy infrastructure and systems, shortage of skilled professionals across the value chain, etc.

Australian utilities are overcoming these challenges by adopting a more holistic BPM-focused approach to intelligent automation initiatives. They are partnering with BPM providers to optimise and automate their business processes to achieve operational excellence, streamline processes and rationalise back-office. Utilities are prioritising BPM platforms that can seamlessly integrate with other technologies for a unified automation ecosystem - (Enterprise Resource Planning (ERP), Customer Relationship Management (CRM), Customer Lifecycle Management (CLM) and Robotics Process Automation (RPA).

Service providers are offering AI and ML, automation and analytics-based solutions to eliminate costs, increase revenue and remain competitive. Although significant progress has been made in automation and AI initiatives, many utilities are yet to scale up their initiatives.



Technology professionals should read this report to understand how BPM/BPO service providers integrate multiple technologies into their proprietary offerings and compare their technical capabilities.



Operations professionals should read this report to understand providers' relative positioning and capabilities to offer end-to-end iBPMS and deliver higher efficiency and effectiveness.



Digital professionals should read this report to understand how providers of BPM services are enhancing their digital transformation initiatives for an improved CX and how they compare with one another.

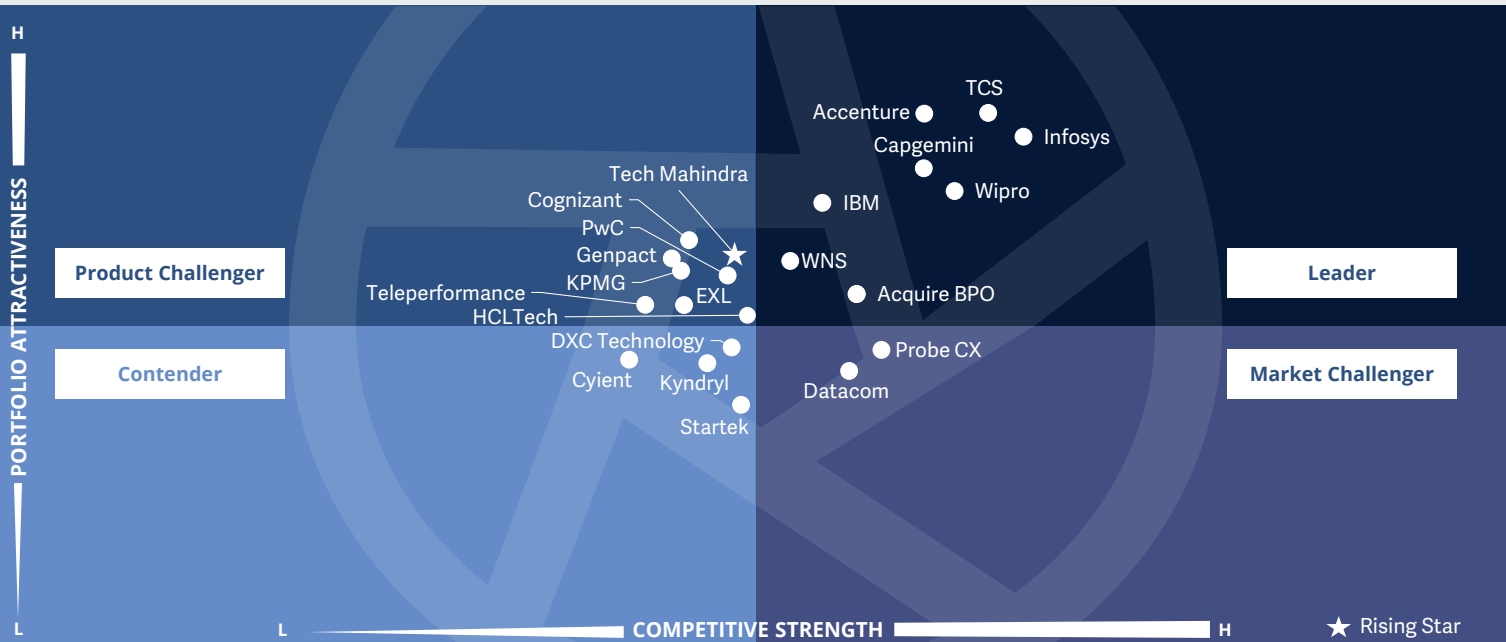


Marketing and sales professionals should read this report to understand the relative positioning and capabilities of providers that can help them harness iBPMS services effectively.



Power and Utilities – Services and Solutions
Intelligent Business Process Management Services (iBPMS)

Australia 2023



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

Mohd Aves Malik



Intelligent Business Process Management Services (iBPMS)

Definition

The quadrant assesses service providers that offer power and 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 CX 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 and 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
2. Knowledge of the **industry and local/regional regulatory requirements**
3. Experience in **optimising 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 specialising in power and utilities
6. Offer **referenceable case studies** for various services and solutions across the value chain



Intelligent Business Process Management Services (iBPMS)

Observations

Major IT providers such as Accenture, Capgemini and IBM claim to be leaders in offering BPM services to enterprises in the utilities industry. One of the local Australian providers, Acquire BPO, also managed to be in a leadership position due to its local presence and experience in BPM. India-based providers, including Infosys, TCS, Wipro and WNS, are also among the leaders due to strong BPM experience and a decade of Australian presence. Tech Mahindra (Rising Star) has a robust partner ecosystem and domain and digital experience. Providers of BPM/BPO services in the Australian market are constantly looking to upgrade themselves from traditional and manual back-office work to be a solution provider leveraging tech stack, including automation, bots, data and analytics, and platform-based solutions.

According to the 1Q23 ISG Index, industry-specific BPO capabilities continue to garner good traction with clients across industries, including energy and resources.

The leaders are also aggressively acquiring small consulting and technology regional players to enhance their regional presence and capabilities. Leading players are also looking forward to monetise their utilities' focus innovation centres or solution-specific CoE.

From the 52 companies assessed for this study, 22 have qualified for this quadrant, with eight being Leaders and one a Rising Star.

accenture

Accenture has a two-decade, long-standing BPM experience, supported by strong utilities domain experience, thought leadership, partnerships and investment in innovation.

Acquire BPO

Acquire BPO is an Australia-based end-to-end BPM service provider. It leverages robotic process automation (RPA) and speech analytics to drive clients' process improvement.



Capgemini has strong domain and BPM experience. It focuses on reskilling employees through mentorship programs and partnerships with online learning vendors.



IBM's intelligent workflow is the base of its BPM capabilities, augmented by hybrid cloud, data and AI insights. In addition, IBM Garage helps in the co-creation and ideation of innovative concepts supported by a strong partnership ecosystem.



Infosys' BPM capabilities are underpinned by its core differentiating aspects such as automation, user experience and domain expertise. It has a strong delivery footprint in Australia and has opened two innovation hubs in the region.



TCS has large BPM practice for utilities and a proprietary tool, Cognix™, that is designed based on the company's machine-first approach. In addition, it has developed a strong partner ecosystem with major platform providers such as SAP.



Wipro has developed utilities-focused BPM solutions by leveraging its domain expertise. It invests in startups to create innovative solutions that are industry-specific, integrated, light touch, advanced and sustainable.



Intelligent Business Process Management Services (iBPMS)

WNS

With 17 years of experience in AI and analytics, utilities domain experts and a strong partner ecosystem augmenting BPaaS, RPA and AI capabilities, **WNS** has developed utilities-specific solutions.

TECH mahindra

Tech Mahindra (Rising Star) has a mature utility BPM practice and has developed proprietary BPM solutions such as UtilityRise, a platform-based, end-to-end utility service solution.





“Infosys is one of the global leaders in BPM services, with a strong global and Australian delivery footprint and a mature partner ecosystem.”

Mohd Aves Malik

Infosys

Overview

Infosys is headquartered in Bengaluru, India, and operates in 54 countries. It has more than 343,200 employees across 247 global offices. In FY23 the company generated \$18.2 billion in revenue, with Financial Services as its largest segment. Infosys has two decades of experience in BPM practice, driven by its deep utility domain expertise and strong focus on end-to-end transformation solutions. The company has served various utilities in Australia for over a decade and has forged strategic partnerships with the region's major utilities.

Strengths

Strong and continuing partnerships:

Infosys created a robust partner ecosystem with major digital players such as Blue Prism, Automation Anywhere, UiPath, EdgeVerve Systems, Celonis, GiBots, Esri, AutoCAD and Precisely; delivery partners; and enterprise function platforms such as BlackLine and HighRadius. It also has multiple academic collaborations with universities such as Cornell, JNTU, Purdue and Stanford.

Strong local and global delivery capabilities:

It has a presence in 35 locations spread across 14 countries. The company has more than a decade of experience in the Australian utilities industry. Recently, Infosys opened Living Labs (innovation hubs) in Melbourne and Sydney to accelerate the development of innovative solutions in the region.

Strong experience in BPM:

Infosys is one of the BPM leaders globally and has experience in delivering end-to-end services across verticals. Its F&A practice has more than 17,000 professionals globally and has one of the largest CoEs in the industry. It also provides platform-based services for Accounts Payable (AP) and Accounts Receivables (AR). Its AP on Cloud (APOC), a flagship ERP-agnostic AP platform, is offered with BPM as a service. Infosys' core differentiating factors, including automation, user experience and domain expertise, play a key role in all its BPM solutions.

Caution

Infosys has long-standing experience in the Australian utilities industry and has a strong footprint in the water utilities industry in the region. It should leverage its deep expertise and local presence to further tap opportunities in the electricity and gas utility industries in the region.





Next-Gen IT Services

Who Should Read This Section

This report is relevant for Australian enterprises in the power and utilities industry for evaluating providers of next-gen IT services.

In this quadrant report, ISG highlights the current market positioning of providers that offer next-gen IT services such as automation, analytics, IoT, AI and ML solutions to power and utilities companies and how they address the key challenges faced in the region.

With the growing complexity of infrastructure and customer and business expectations, utilities are under immense pressure to provide support and drive innovation using technology. This is further complicated by changing environmental requirements, rising competition, aging infrastructure and the need for automated insights.

It is becoming increasingly difficult for Australian utilities and critical infrastructure operators to manage cybersecurity risks.

Increasingly connected systems and poorly integrated IT/OT systems are broadening the scope of cyberattacks. The regulation of critical infrastructure under the Security of Critical Infrastructure Act 2018 places obligations on utility providers to strengthen the security and resilience of their infrastructure and network. Also, the increasing demand for and scarcity of IT and cyber skills are forcing utilities to partner with experienced service providers to secure their systems against cyber threats by investing in security measures and operations.

Cloud investment is already an integral part of the utilities industry. The utilities are making a substantial investment in cloud infrastructure to upgrade and replace legacy systems without running the risk of managing them in-house, allowing the utilities to focus on their core business activities.



Technology professionals should read this report to understand how next-gen IT service providers integrate multiple technologies into their proprietary offerings and compare their technical capabilities.



Operations professionals should read this report to understand providers' relative positioning and capabilities that offer end-to-end next-gen IT services to deliver higher efficiency and effectiveness.



Digital professionals should read this report to understand how next-gen IT service providers enhance their digital transformation initiatives for an improved CX and how they compare with one another.

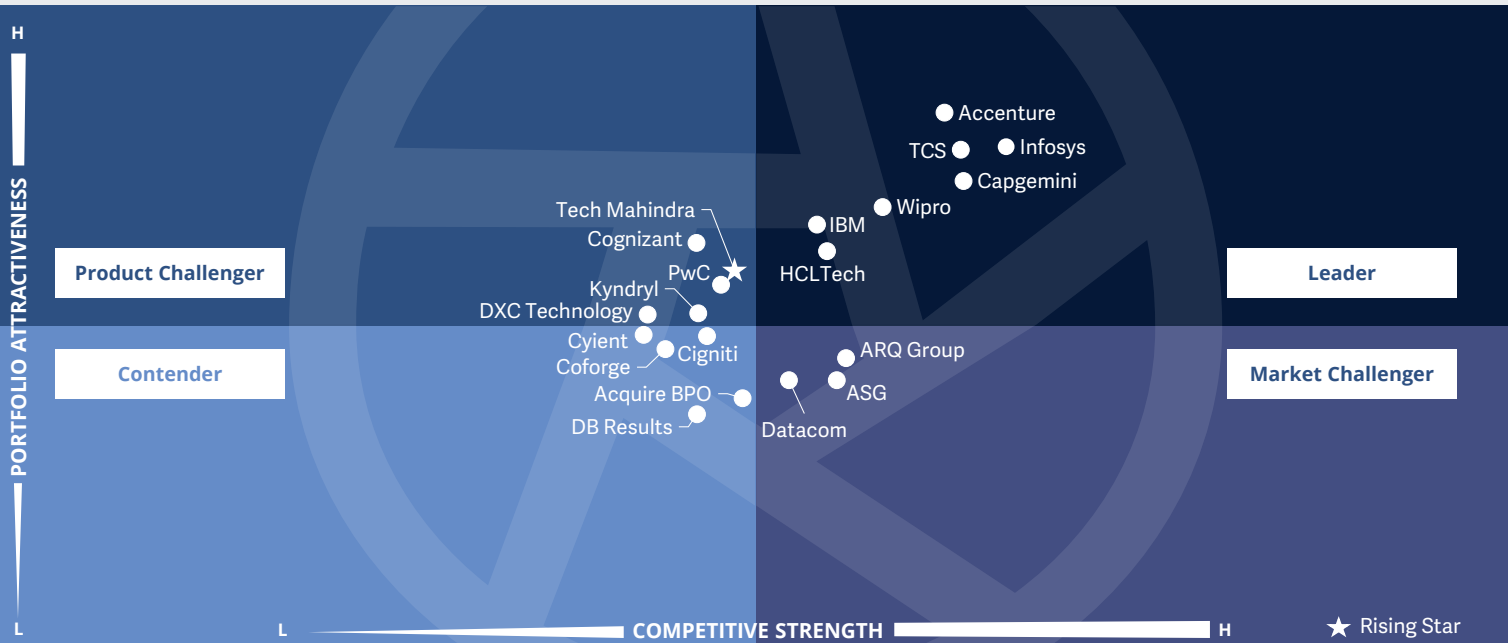


Marketing and sales professionals should read this report to understand the relative positioning and capabilities of providers that can help them harness next-gen IT services effectively.



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

Australia 2023



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

Mohd Aves Malik



Definition

This quadrant assesses service providers offering IT managed services to the power and utilities industry. The services include application development and maintenance (ADM), infrastructure services (data centre, 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, minimise costs, optimise assets and maximise customer satisfaction.

Eligibility Criteria

1. Ability to offer a combination (if not all) of the following IT services to companies across **the power and 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 centres, network operations centres and cloud
 - * Cybersecurity solutions
 - * Next-gen technologies such as automation, analytics, AI, ML, 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 specialising in power and utilities
4. Experience in **large transition projects** that include post-merger integration of companies, IT-driven business transformation, cybersecurity and modernisation of legacy systems and applications in the industry
5. Offer **referenceable power and utilities case studies** for various services and solutions across the value chain



Next-Gen IT Services

Observations

The providers that offer next-gen IT services to utilities have strong domain understanding and hands-on experience in delivering multiple projects across the industry, covering generation, transmission, distribution, and water and gas. The requirement for niche capabilities makes this quadrant attractive to large providers. Most large IT players are leveraging their capabilities across AI, IoT, cloud/edge and 5G to dominate the Australian power and utilities industry.

Three large global IT providers, Accenture, Capgemini and IBM, are qualified as Leaders in this quadrant. However, the quadrant is dominated by Indian IT players, including HCLTech, Infosys, TCS and Wipro, which are Leaders. Tech Mahindra, another Indian player, has become a Rising Star in this quadrant with its local presence and Geographic Information System (GIS) mapping capabilities.

The Leaders in this quadrant understand the need to have a better regional presence, and they try to fill the capability gap by establishing strong partnerships and making acquisitions. Some of the key acquisitions in this space are Accenture's acquisition of Industrie&Co to enhance cloud capabilities and Capgemini's acquisition of Altran to enhance engineering capabilities. Most of the Leaders have also partnerships with large firms, such as Microsoft Azure, AWS, Google, SAP, NexantECA, Bidgely, Itron and Landis+Gyr.

From more than 52 companies assessed for this study, 20 have qualified for this quadrant, with seven being Leaders and one a Rising Star.

accenture

Accenture is the largest service provider for the utilities industry globally. Its capabilities are supported by its Industry X, strong partner ecosystem and focus on acquisitions to enhance cloud capabilities.

Capgemini

Capgemini possesses strong engineering capabilities through the acquisition of Altran and has been enhancing its digital capabilities with a focus on the ANZ region. In terms of technology, 5G is one of the key focus areas for the company.

HCLTech

HCLTech has more than 40 years of engineering service experience and has obtained over 1,500 patents. Australia is one of the focus areas for the company; it has been in the market for two decades and has seven delivery centres.

IBM

IBM is among the leading providers for asset-intensive industries and has a strong focus on innovation. The company has made two acquisitions in the ANZ region to augment its cloud and data analytics capabilities.

Infosys

Infosys has a strong presence in the Australian region and has a suite of customisable solutions for utilities. It focuses on developing 5G use cases through a 5G utility CoE in Australia.

tcs TATA CONSULTANCY SERVICES

TCS combines its domain experience, digital capabilities and differentiated location strategy to deliver utility-specific solutions. The company has developed a strong academic partnership to increase the momentum of research and innovation.



Next-Gen IT Services



Wipro has developed strategic partnerships with multiple electric, gas and water utilities from the ANZ region. The company sees energy technology platforms as the new trend in the market and helps clients choose the right platform for their needs.



Tech Mahindra (Rising Star) has been focusing on developing innovative solutions pertaining to 3D imaging and GIS mapping. It has also developed data accuracy and analytics solutions and sustainability-related solutions targeting greenhouse gas (GHG) reduction.



Infosys



“With a strong presence in Australia, Infosys delivers end-to-end IT solutions and focuses on developing innovative 5G use cases for utilities.”

Mohd Aves Malik

Overview

Infosys is headquartered in Bengaluru, India and operates in 54 countries. It has more than 343,200 employees across 247 global offices. In FY23 the company generated \$18.2 billion in revenue, with Financial Services as its largest segment. Infosys’ utility services practice leverages proprietary solutions and digital and industry partnerships to provide consumption-based services. In Australia, the company has been serving various utilities for over a decade, and it is a strategic partner for more than seven utilities in the region.

Strengths

Strong partner ecosystem: Infosys has a robust partner ecosystem in the utilities market, comprising enterprise platforms (Oracle, SAP, Maximo®) and hyperscalers (AWS, Microsoft, Google, IBM). Infosys also developed partnerships with niche providers such as NexantECA, Bidgely, Itron and Landis+Gyr. It is also promoting research activities with academia through collaborations with universities such as Cornell, Purdue and Stanford.

Regional presence: Infosys has been present in the Australian utility market for more than 10 years and has been able to maintain strong growth, with a CAGR of 29.3 percent, since 2016. To further augment its utility service offerings, the company opened a living lab in Melbourne, which is a utility CoE for

carrying out 5G use cases for the industry. The living lab will make utility clients future-ready through initiatives such as ideation workshops and visualisation engagements.

Innovative solutions: Infosys has a suite of customisable solutions for the utilities, including Infosys Live Enterprise Application Management Platform (LEAP) for application management; Infosys Cobalt, a set of services, solutions and platforms to accelerate the cloud journey; and Infosys KRTI 4.0, which helps industrial, utility and infrastructure organisations overcome complex and expensive lifecycle management challenges across OT systems.

Caution

To grow further in the regional market, Infosys should leverage its strong experience in the Australian utilities industry, aggressively focusing on covering major parts of the utilities value chain in the region.





Grid Modernization

Grid Modernization

Who Should Read This Section

This report is relevant to power and utilities companies in Australia for evaluating providers of grid modernization services.

In this quadrant report, ISG highlights the current competitive market positioning of providers that offer grid modernization services to power and utilities companies in Australia and how they address challenges around grid optimisation and resiliency in the region.

The shift towards clean energy and decarbonisation is changing the market dynamics in the power and utilities sector. The industry also faces a complex macroeconomic situation due to drastic climatic changes, new legislations, rising fuel costs and economic uncertainty. As the demand for energy continues to rise, the dated infrastructure, challenges in energy distribution, high cost of renovating or building new power lines, lack of

digitally skilled workforce and flexible pricing models place an additional burden on the system. In addition, with the Russia-Ukraine war and supply chain constraints on Russian gas exports, Australian gas utilities are under pressure to invest in natural gas in the region to mitigate geopolitical risks.

To address the above-mentioned challenges, Australian utilities are prioritising rapid grid modernization and investing in a resilient and secure power grid, distributed power generation and renewable energy sources. While some of these grid modernization efforts were initiated by utilities, most of the efforts were initiated in response to local or state-level policy or legislative drivers. The Government of Australia plans to invest \$10 billion to modernize the national power grid to provide more renewables, transmission and storage.



Technology professionals should read this report to understand how grid modernization service providers integrate multiple technologies into their proprietary offerings and compare their technical capabilities.



Operations professionals should read this report to understand providers' relative positioning and capabilities that offer end-to-end grid modernization to deliver higher efficiency and effectiveness.



Digital professionals should read this report to understand how grid modernization service providers enhance their digital transformation initiatives for an improved CX and how they compare with one another.

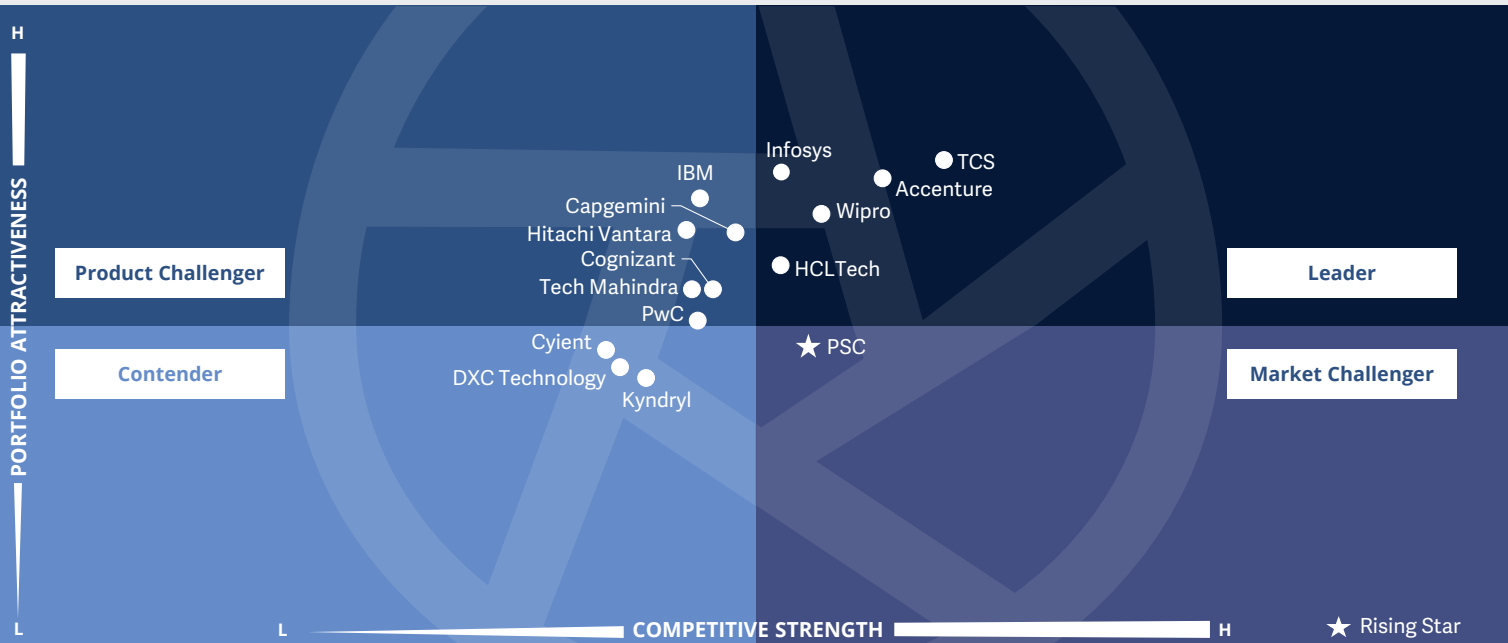


Marketing and sales professionals should read this report to understand the relative positioning and capabilities of providers that can help them harness grid modernization services effectively.



**Power and Utilities – Services and Solutions
Grid Modernization**

Australia 2023



This quadrant assesses service providers that offer grid modernisation and related services in the power and utilities industry. Transmission and distribution (T&D) firms are looking to **increase the reliability of their grids through technology adoption.**

Mohd Aves Malik



Definition

This quadrant assesses service providers offering grid modernisation and related services in the power and utilities industry. The services include grid modeling, distributed energy resources management system (DERMS), advanced distribution management system (ADMS), geographic information system (GIS), volt/VAR optimisation (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 optimised grid infrastructure.

Eligibility Criteria

1. Exposure to **working around grid modernisation** and related services for clients in the market
2. Demonstrate **successful grid modernisation-related engagements** (past and present) with at least three power and 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 optimisation 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 realisation
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 specialising in power and utilities
6. Offer **referenceable power and utilities case studies**



Grid Modernization

Observations

Grid modernisation, being a highly specific and niche capability, is dominated by large IT players that have deep domain expertise and strong engineering capabilities. The grid modernisation quadrant is dominated by Indian IT players, including HCLTech, Infosys, TCS and Wipro. PSC, an ANZ-native provider, has been positioned as a Rising Star in this quadrant.

Providers are developing industry forums for collaboration in research and have been holding leadership positions on various global bodies, including IIoT and economic forums. With a growing focus on EV, DER and sustainability/net zero, most Leaders are actively engaged in M&As and selective partnerships with niche players, including Black & Veatch, Dell, Indra/Minsait, RAMTeCH, Kalkitech, Hitachi-ABB, Siemens, Schneider Electric, Emerson Digital Grid (OSI), GE, Landis & Gyr and Anterix, to expand their capabilities.

Providers are working to improve their offerings through a strong technology stack, including advanced analytics, AI and automation, RPA and the cloud. Offerings related to vegetation management have become a hot cake among multiple providers that possess strong visual analytics, GIS and deep learning capabilities.

From more than 52 companies assessed for this study, 15 have qualified for this quadrant, with five being Leaders and one a Rising Star.

accenture

Accenture has developed innovative vegetation management solutions by leveraging deep learning algorithms. It has acquired BRIDGE Energy Group to augment its grid modernisation capability. It has also established a forum, Smart Grid Leadership Network (SGLN), to drive grid transformation initiatives.

HCLTech

HCLTech's strength lies in its large engineering services practice, strong partnerships, leading position in major policy-making organisations and strong presence in the ANZ region, with 2,600 FTEs and seven delivery centres.

Infosys

Infosys has developed innovative grid modernisation solutions, covering IT/OT convergence, distributed energy resources management system (DERMS), EV charging and cloud, with its domain expertise and strong partner ecosystem.

tcs TATA CONSULTANCY SERVICES

TCS has developed strong industry and academia partnerships and has developed one of the first cloud-based platforms to support five-minute trading price settlement in Australia.



Wipro has more than two decades of experience serving the utilities industry and has developed partnerships with regional players. It has also helped AusNet Services with Advanced Distribution Management System (ADMS) implementation.

PSC

PSC (Rising Star): PSC is a local Australian player with a strong presence in the region. It has served almost all major utilities and collaborates with market regulators. It is also expanding its global reach through acquisitions.



Infosys



"Infosys has a vast portfolio of grid modernisation solutions developed with the support of its partner ecosystem and deep domain and digital expertise."

Mohd Aves Malik

Overview

Infosys is headquartered in Bengaluru, India, and operates in 54 countries. It has more than 343,200 employees across 247 global offices. In FY23 the company generated \$18.2 billion in revenue, with Financial Services as its largest segment. Its power and utilities services business falls under the SURE (services, utilities, resources and energy) segment. Its utilities services practice spans electric, gas and water utilities. Its vision for utilities is aligned with grid modernisation, with a focus on end-to-end, vertically integrated digital solutions spanning grid modelling and planning, grid operations, grid resilience and grid analytics.

Strengths

A large suite of focused solutions: Infosys has innovative grid modernisation solutions and capabilities, including Modern Digital Grid (a framework that facilitates the convergence of energy and mobility); DERMS (integration of new DERs with existing IT/OT systems within utilities); the EVCI-CHARM tool (for developing an innovative solution that brings in combined capabilities relating to EV charging infrastructure planning and operations); and Smart Energy Cloud (to manage DERs on the main utility grid or on a microgrid).

Infosys-GE Digital partnership: Infosys joined hands with GE Digital to accelerate grid transformation in the utilities industry. They jointly plan to develop an industry-leading grid orchestration software platform

and a suite of intelligent applications for the collaboration of energy data, network modelling and AI. GE Digital also plans to build a CoE, with the support of Infosys, to expand the talent pool for its GridOS® portfolio.

Strong partner ecosystem: Infosys positions itself well with a solid ecosystem of alliances and partners in the utilities space, including companies like AutoGrid, GE Digital, Resource Innovations, ABB, Schneider Electric, OSIsoft, Kalkitech, Future Grid, Microsoft, Oracle, GridRabbit, Prescinto, SAP, IBM, Esri and Cisco and hyperscalars like AWS, Microsoft and Google.

Caution

To ensure further growth, Infosys should further enhance its position in the ANZ market by leveraging its strong solutions for the power and utilities industry and partnerships with GE and other companies.





Enterprise Asset Management (EAM)

Who Should Read This Section

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

In this quadrant report, ISG highlights the current market positioning of providers that offer EAM, workforce management and field service management services to power and utilities companies and how they address the key challenges around asset maintenance and optimisation and workforce efficiency.

Recent advancements in digital capabilities have transformed the utilities industry's approach to asset management, resulting in more efficient and effective management of assets. However, the rate of adoption does not commensurate with the rapid pace of innovation. Utilities with aging physical assets and paper-based legacy systems cannot

leverage innovations that boost reliability. In addition to the dwindling pool of skilled talent, increasing regulatory scrutiny and mandates, changing legislations and surging cyber risks, utilities must deal with the revenue changes caused by economic uncertainties and volatility arising from increased growth of renewables and distributed energy resources (DERs).

Utilities effectively address the challenges by investing in intelligent, integrated, cloud-based EAM systems.

Utilities in Australia are witnessing significant growth in the deployment of EAM solutions and partnering with the service providers for data and insight-based asset management, remote asset condition monitoring, and smart diagnostics of assets and equipment using AI and ML to optimise asset performance, field productivity and compliance, while enhancing safety, sustainability and quality of service.



Technology professionals should read this report to understand how EAM providers integrate multiple technologies into their proprietary offerings and compare their technical capabilities.



Operations professionals should read this report to understand providers' relative positioning and capabilities that offer end-to-end EAM to deliver higher efficiency and effectiveness.



Digital professionals should read this report to understand how EAM service providers enhance their digital transformation initiatives for an improved CX and how they compare with one another.

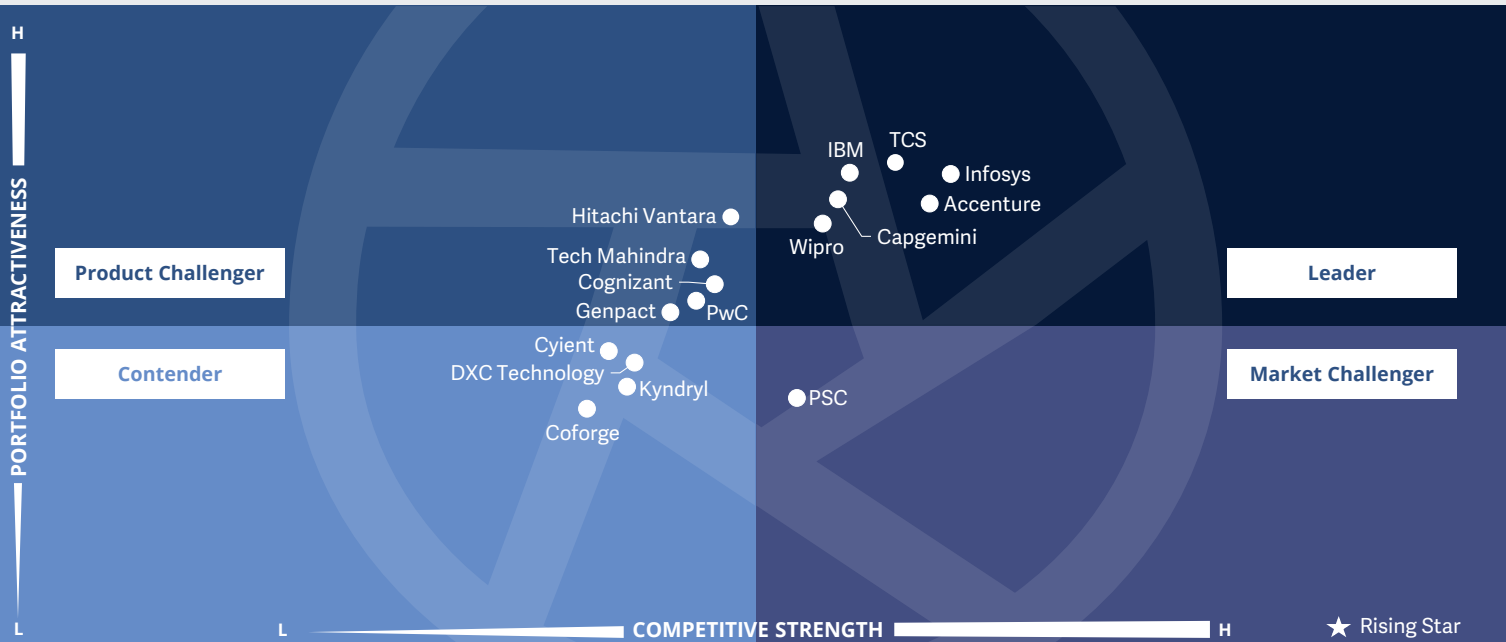


Marketing and sales professionals should read this report to understand the relative positioning and capabilities of providers that can help them harness EAM services effectively.



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

Australia 2023



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

Mohd Aves Malik



Enterprise Asset Management (EAM)

Definition

This quadrant assesses providers offering EAM services and solutions to clients in the power and utilities space. The services include asset lifecycle management, maintenance, repair and operations, labor management, controls management, application maintenance and support, 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 and utilities industry in the country/region
2. Demonstrate **successful EAM-related engagements** (past/present) with at least three power and 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
 - * Computerised maintenance management system (CMMS)
 - * Controls management
 - * Warranty management
 - * Geographic information system (GIS)
 - * Digital EAM solutions (based on AI and machine learning)
 - * Analytics and reporting
 - * Field management services
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 specialising in power and utilities
6. **Referenceable case studies** for various services and solutions across the value chain



Enterprise Asset Management (EAM)

Observations

This quadrant is equally dominated by multinational players such as Accenture, Capgemini and IBM and Indian players such as Infosys, TCS and Wipro. All the Leaders have strong domain experience and, on average, two decades of experience serving the utilities industry in Australia.

Most of the Leaders have experience in implementing and integrating the IBM Maximo suite into their current set of offerings specific to the utilities industry. Their EAM capabilities are developed mostly from parent group inheritance, and they also have IoT and digital engineering capabilities.

Leaders continue to look at M&A opportunities that can help them build niche digital EAM capabilities and platform implementation capabilities. They are focusing on research and filing patents to create a culture of innovation.

The key technologies that support these providers' EAM solutions are IoT, digital twin, AR and VR, AI and cloud. Almost all Leaders have proprietary solutions that are customisable to meet the needs of their utility customers.

From the 52 companies assessed for this study, 16 have qualified for this quadrant, with six being Leaders.

accenture

Accenture helps its utility clients in the optimisation of assets through intelligent asset management (IAM) capabilities powered and underpinned by RPA, AI and ML.



Capgemini possesses strong engineering capabilities obtained through the acquisition of Altran. The company focuses on innovation and has a dedicated utilities innovation centre to build industry 4.0 capabilities.



IBM's Leader position in this quadrant is supported by the strong presence of IBM Maximo and its integrated AI capabilities. The company also has a strong research foundation built on a large number of patents related to asset management solutions.



Infosys has developed EAM capabilities by combining its domain expertise, products and core engineering/IoT capabilities. It is a Platinum partner for IFS and IBM Maximo and has also developed partnerships with startups.



TCS has inherited strong EAM capabilities and developed niche IoT and digital field service management practices. It has a strong Australian presence and has helped multiple utilities in EAM optimisation and transformation.



Wipro has one of the largest EAM practices in Australia and more than two decades of experience serving the utilities industry. It has handled more than 40 EAM transformation projects. It is developing innovative offerings for worker safety and asset data management.





“Infosys developed EAM capabilities on the foundation of its Digital Energy Orchestrator and strong partner ecosystem.”

Mohd Aves Malik

Infosys

Overview

Infosys is headquartered in Bengaluru, India and operates in 54 countries. It has more than 343,200 employees across 247 global offices. In FY23 the company generated \$18.2 billion in revenue, with Financial Services as its largest segment. Infosys offers consulting, IT and business process services. The power and utilities business falls under the company's SURE (services, utilities, resources and energy) segment. Infosys' EAM practice brings together the company's domain expertise, industry best practices and leading products-based digital solutions.

Strengths

Domain expertise: Infosys has a strong EAM practice with more than 2,000 experts serving over 40 clients. The practice has over 2,000 person-years of experience and provides solutions that use new-age connected technologies, such as IoT, cloud, AI and ML, for efficient management of assets across the utilities value chain.

Strong partner ecosystem: Infosys has developed strong partnerships with its two decades of experience in the utilities industry. It is a Platinum partner for IFS and IBM Maximo and has developed an IFS CoE with PoCs and over 300 person-years of experience. It has created a readily built solution, Catalyst, for SAP S/4HANA. It also has a partnership with NexantECA, and it works with infrastructure OEMs (ABB and

Schneider Electric) and hyperscalers (AWS and Azure) for cloud infrastructure. The company has also built niche partnerships with startups like Vantiq and TagBox to leverage new-age technologies.

Large suite of solutions: Infosys' EAM capabilities are developed based on Digital Energy Orchestrator (DEO), which combines its capabilities in product and core engineering and IoT solutions with its domain expertise. Infosys has invested in KRTI 4.0, a core predictive asset maintenance AI framework for utilities, in partnership with Pöyry. It enables enterprises to create AR experiences for improving field service operations.

Caution

Infosys should further leverage its industry experience, strong domain expertise, and global technical, digital and niche partnerships to tap more growth potential and win new clients in the Australian utility market.





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

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

Who Should Read This Section

This report is relevant to enterprises in the power and utilities industry in Australia for evaluating providers of customer information systems (CIS) or customer experience (CX) services.

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

Utilities are facing unprecedented competition from new entrants. Due to the availability of more provider options, consumers demand cost-effective and flexible services with exceptional delivery. In addition to changing consumer preferences, economic issues and reducing margins further burden the utilities to invest heavily in enhancing CX to attract and retain customers.

To address these challenges, Australian utilities are investing in several innovative CX technologies such as self-service customer portals, digitised consumer interactions, RPA or AI-enabled chatbots, website optimisations and data-rich, innovative home technologies to optimise customer journeys and experiences.

Even regulators are bringing reforms to assist customers in making informed decisions about energy usage. The Australian government recently mandated that its consumers must have access to smart meters under its Power of Choice (PoC) initiative to better respond to changes in the electricity industry, market and technologies.

The service providers are implementing data-driven CIS/CX solutions and sustainability-related services underpinned by their own or partner solutions and accelerators, enabling utility resources to focus on innovation.



Technology professionals should read this report to understand how CIS/CX providers integrate multiple technologies into their proprietary offerings and compare their technical capabilities.



Operations professionals should read this report to understand providers' relative positioning and capabilities that offer end-to-end CIS/CX to deliver higher efficiency and effectiveness.



Digital professionals should read this report to understand how CIS/CX service providers enhance their digital transformation initiatives for an improved CX and how they compare with one another.

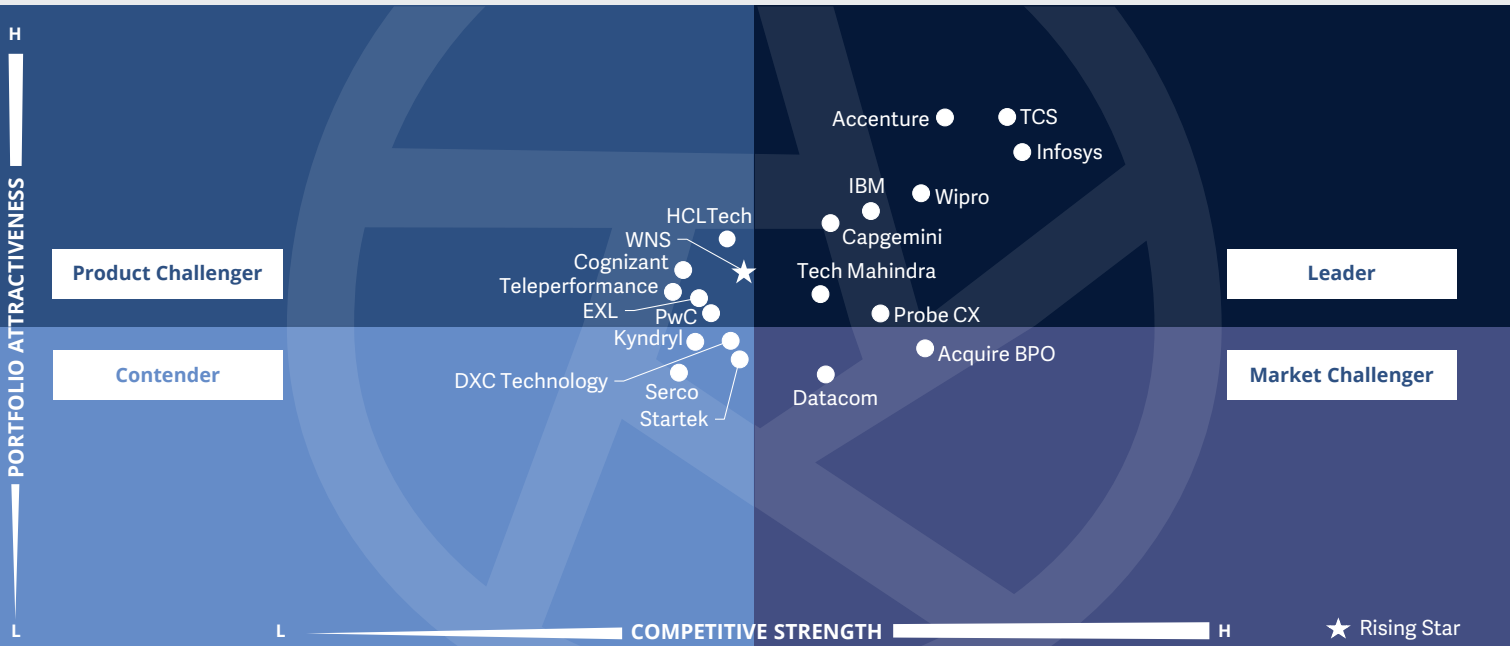


Marketing and sales professionals should read this report to understand the relative positioning and capabilities of providers that can help them harness CIS/CX services effectively.



**Power and Utilities – Services and Solutions
Customer Information System (CIS) and Customer Experience (CX)**

Australia 2023



This quadrant assesses service providers that offer customer-centric solutions and offerings. With the changing customer profile, **robust CIS will help utilities better manage customer interaction and relationships.**

Mohd Aves Malik



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 and utilities industry. These include account management, order processing, product management, rate design (handling complex rate structures), data management, billing, credit and collections, payment processing, contact services (call centre), interactive voice response (IVR), consumer engagement, customer self-service and relationship management, enabling an enriched CX.

Eligibility Criteria

1. Exposure to **working in CIS and CX** for power and utilities clients in the market
2. Demonstrate **successful CIS-related engagements** (past and present) with at least three power and utility companies
3. Provide at least one of the following **offerings related to CIS and CX**:
 - 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
4. Ability to **adapt to changes** in regulations, compliance, rate structures and evolving billing and retail needs
 - Customer service
 - * 24/7 contact or call centres (customer interaction)
 - * IVR services
 - * Consumer engagement (social media, virtual assistant and chatbots)
 - * Customer self-service
 - * Relationship management
5. Expertise in **applying next-gen technologies**, including automation, analytics, IoT, AI, cybersecurity, cloud and blockchain, for client engagements in this space
6. Demonstrate **strong partnerships** with industry associations, regulatory bodies, technology firms and startups specialising in power and utilities
7. Offer **referenceable case studies** for various services and solutions across the value chain



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

Observations

The CIS space of the utilities industry in Australia is dominated by large providers such as Accenture, Capgemini, IBM, Infosys, TCS, Tech Mahindra and Wipro. Probe CX, a local Australian provider, also managed to be a Leader in this quadrant. WNS has become a Rising Star with its innovative solutions and EXPIRIUS operating model.

Providers are partnering with niche players, such as Adobe, SAS, Salesforce, AWS, Google, Microsoft, Oracle, SEW, powercloud, ENSEK, NexantECA, and Milestone Technologies to drive innovation and solution development in the CIS space. Large providers have developed proprietary tools and successfully conducted focused acquisitions to enhance their CIS/CX capabilities.

Key CIS solutions focus on areas such as utility billing management, customer self-services, ERP implementation, CX, customer onboarding, customer journey management, meter-to-cash and EV billing solutions.

From the 52 companies assessed for this study, 20 have qualified for this quadrant, with eight being Leaders and one a Rising Star.

accenture

Accenture has augmented its CIS capabilities through the acquisition of fiftyfive5 and its partnership with Genesys. The company leverages its Accenture Song program and design thinking to help imagine new personalised service experiences.

Capgemini

Capgemini has been present in the Australian utility industry for more than a decade. Its Intelligent Customer Operations solutions put utility customers and employees at the centre of business operations by implementing a scalable, cloud-based, omnichannel platform.

IBM

IBM has strong CIS capabilities and a strong partner ecosystem. It offers end-to-end CIS solutions and has developed innovative proprietary solutions for its utility customers.

Infosys

Infosys has developed a strong CIS practice through proprietary tools, accelerators, process assets and the experience gained from large-scale transformations. It is developing multiple innovative solutions, including EV billing management.

probeCX

Probe CX is an Australian CX provider with significant experience in the utilities industry. It is further enhancing its capabilities through the acquisition of digital players.

tcs

TCS has strong partnerships with leading platform providers, including SAP, Oracle and Salesforce. It has also developed innovative solutions and worked with Australian utilities in delivering CIS transformation and billing solutions.

TECH mahindra

Tech Mahindra has developed an innovative solution to cater to the CIS aspects of the utilities industry. It has also developed a strong partnership with LivePerson, a global leader in digital CX management.

wipro

Wipro has developed cloud-based billing solutions in partnership with major utility billing solutions providers. It also has notable experience in large-scale SAP CIS transformation in the ANZ region.

WNS

WNS (Rising Star) has developed EXPIRIUS, an innovative CX operating model, and focuses on talent development through a customised approach, partnership with universities and an in-house virtual training portal.





“Infosys focuses on enhancing and building new CIS and CX solutions and offerings through partnerships and in-house accelerators.”

Mohd Aves Malik

Infosys

Overview

Infosys is headquartered in Bengaluru, India, and operates in 54 countries. It has more than 343,200 employees across 247 global offices. In FY23 the company generated \$18.2 billion in revenue, with Financial Services as its largest segment. Infosys CIS transformation services includes CIS consolidation and modernisation, business process improvements, contact centre optimisation, service-oriented architecture (SOA) enablement and the implementation of commercial off-the-shelf (COTS) packages. Infosys' customer service practice for utilities has more than 25 years of experience and employs over 3,800 experts serving 45 clients across the globe.

Strengths

Strong CIS practice: Infosys' customer service practice has long-standing experience and currently serves six of the global top ten utilities. It has over 100 tools and accelerators, more than 3,500 process assets and an experience of handling over 400 large Oracle engagements across more than 40 countries in the last four years. Infosys aims to become a strategic partner of choice for clients, bringing in best-in-class digital services and consulting to help them with their digital journeys based on a strategy focused on Navigate Your Next.

Robust partnerships: Some of the key partners in the CIS domain are Oracle Utilities, SAP, Salesforce, Microsoft Dynamics 365, SEW, powercloud, ENSEK, NexantECA, and Milestone Technologies.

Innovative solutions: Infosys has multiple innovative CIS solutions, including Infosys Pre-configured and Accelerated Customer care and billing Enablement, which is designed to accelerate the adoption of CIS transformation programs. Infosys also offers AI-enabled Contact Center Cockpit for Utilities; a prosumer toolkit with various features that provides an application that seamlessly onboards prosumers; Infosys Cortex that addresses the gap between contact channels and traditional CRM with intelligence and analytics; and a new billing engine for EV adoption and DER.

Caution

Infosys has a strong presence in the utilities industry of Australia. However, the company should focus on developing and implementing transformation accelerators and innovative EV and sustainable energy billing and CX solutions.





Appendix

The ISG Provider Lens™ 2023 – Power and Utilities Services and Solutions study analyses the relevant software vendors/service providers in the Australian market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research™ methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research™ programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of March 2023, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

The study was divided into the following steps:

1. Definition of Power and Utilities – Services and Solutions market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG’s internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
 - * Strategy & vision
 - * Tech Innovation
 - * Brand awareness and presence in the market
 - * Sales and partner landscape
 - * Breadth and depth of portfolio of services offered
 - * CX and Recommendation



Author & Editor Biographies

Lead Author



Mohd Aves Malik
Lead Analyst

Mohd Aves Malik brings more than a decade of Energy, technology, business research, and analytics experience and expertise to ISG clients. He has rich experience in executing strategic research, data analytics, and competitive intelligence projects in energy, utilities, IT-BPM, and metal clients.

Prior to ISG, Aves worked with the growth and business strategy function of Genpact and Teleperformance. At ISG, He is focused on ISG Provider Lens™ covering the Energy and Utilities Industry's market development, disruption, and change. He currently contributes to ISG's Provider Lens global research studies as a lead analyst.

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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 over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.



ISG 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](#).

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ISG

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Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,600 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.

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AUGUST, 2023

REPORT: POWER AND UTILITIES – SERVICES AND SOLUTIONS