ISG Provider Lens™

Utilities Industry - Services and Solutions

Digital Transformation Services and Solutions – Large Accounts

North America 2021

Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

Infosys®

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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ISG Provider Lens™

ISG Provider Lens™

ISG Provider Lens™ delivers leading-edge and actionable research studies, reports and consulting services focused on technology and service providers' strengths and weaknesses and how they are positioned relative to their peers in the market. These reports provide influential insights accessed by our large pool of advisors who are actively advising outsourcing deals as well as large numbers of ISG enterprise clients who are potential outsourcers.

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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 360º 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

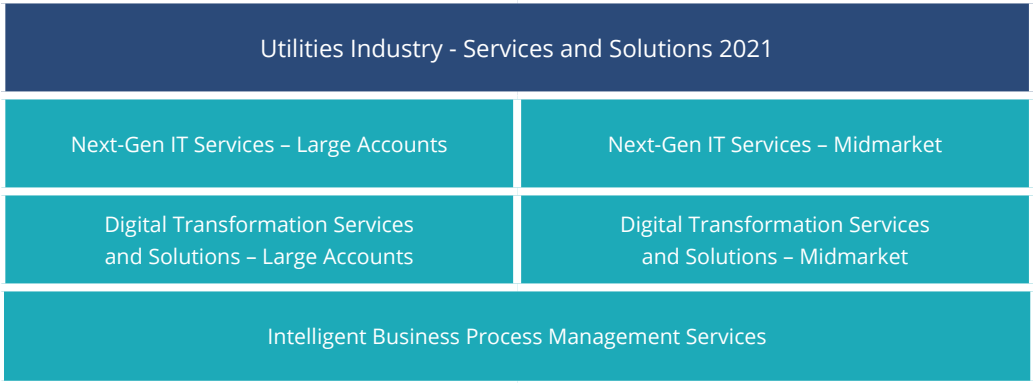
With the rapid digitization and increased investments in modernizing grid and IT-OT systems, the utilities industry is seeing more digital transformation sourcing engagements compared to traditional IT managed services and business process management (BPM) deals. Furthermore, digital transformation deals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

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.

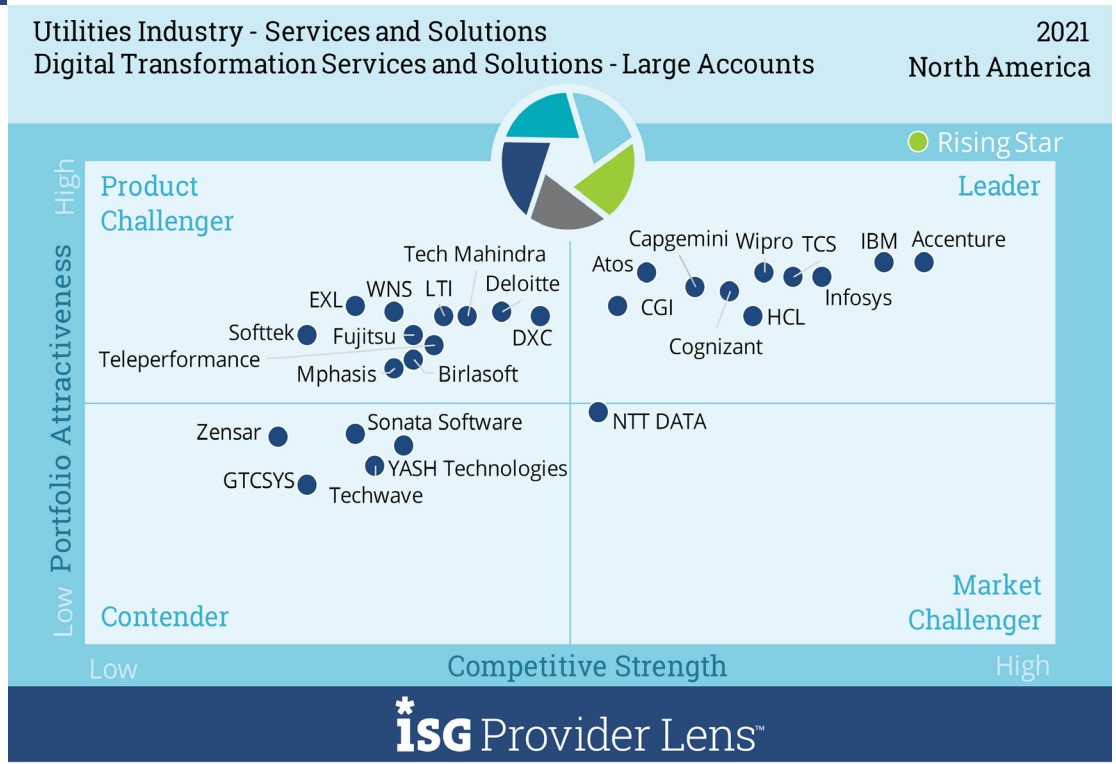
IT and technology leaders should read this report to understand how providers of digital transformation services are integrating multiple technologies into their proprietary offerings and compare their technical capabilities with the rest of the market.

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.



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.

INFOSYS

Overview

Infosys is a global provider of consulting, technology, outsourcing and next-generation digital solutions and services. The company serves its clients in North America through a network of innovation hubs across the U.S., nearshore delivery centers in Canada and Mexico and offshore delivery centers in India. It leverages its proprietary solutions framework, tools and accelerators, including the Infosys Nia™ chatbot, PACE framework and smart bot repository for utilities. It caters to 70 clients and employs nearly 10,000 people to support its global utilities practice.

Strengths

Strong client portfolio and top-line performance: Infosys has a strong utilities client base in North America, offering digital transformation services and solutions to more than 25 clients (including 11 out of the top 25 U.S. utilities companies) with the support of more than 700 consultants worldwide. Its digital transformation services for utilities businesses in the region accounted for more than 55 percent of its total utilities' services revenue in FY2020.

Investments in innovation and R&D: The company is continuously investing in innovation and R&D to help its utilities clients with energy transition. It has established regional dedicated innovation labs called Infosys Living Labs in Raleigh for the eastern U.S. and Phoenix for the west. These centers are focused on cloud, big data, design thinking, AI and IoT to help quickly identify, develop, deliver and scale disruptive innovations to clients.

Delivery excellence: Infosys is continuously investing heavily in IP to create proprietary solutions framework, tools and accelerators, including Nia™, Infosys Live Enterprise Application Management Platform, PACE and edge remediation frameworks, KRTI 4.0 AI framework, Next Gen Grid framework, LEAP platform and XR platform. Its investments in accelerators, emerging technology and solutions around AI, cognitive automation, IoT and next-generation offerings enable quicker implementations and value realization for clients.

Caution

Infosys has a strong track record of delivering some of the most complex business transformations in the recent past for large utilities clients by leveraging best-of-breed solutions that include platforms and accelerators. However, it should focus on strengthening the marketing and creating awareness of its digital capabilities and solutions for utilities to garner market recognition and build mindshare equivalent to the competencies it has already showcased.

2021 ISG Provider Lens™ Leader

Infosys is keeping an eye on the latest trends in the digital utilities industry. Its ability to bring best-of-breed solutions and innovation to drive the digital transformation journey of utilities clients has helped it to win several proactive bids.

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

Amar Changulani is the senior lead analyst at ISG and responsible for authoring Provider Lens™ studies on Utilities, Finance and Accounting Outsourcing, and Intelligent Automation. He covers key areas around digital transformation, business process automation, intelligent document processing, process mining and RPA. Additionally, Amar works with ISG advisors and clients on research engagements related to hyper automation. He has also authored various provider briefing notes as well as a research report - Enterprise Automation Capability Improves but RPA Wall Still Looms, which explores the typical automation adoption profile, the most common obstacles and best practices for accelerating adoption, helping enterprises understand where they are relative to others and how they can scale automation initiatives across the business.

Sagnik Biswas – Co-Author

Senior Lead Analyst

Sagnik is a Senior Lead Analyst in ISG Research and has more than 10 years of experience in market and industry research across various emerging technologies. In ISG, he is responsible for authoring thought papers focused on the Banking & Financials, Travel & Transportation, Utilities industries and in the Application Development & Maintenance space. He holds a degree in business administration from International School of Business & Media and an undergraduate degree in Economics from University of Delhi.

Author and Editor

Jan Erik Aase, Editor

Director

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.

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