ISG Provider Lens™

Utilities Industry - Services and Solutions

Next-Gen IT Services – Large Accounts

North America 2021

Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

June 2021

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Infosys®

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

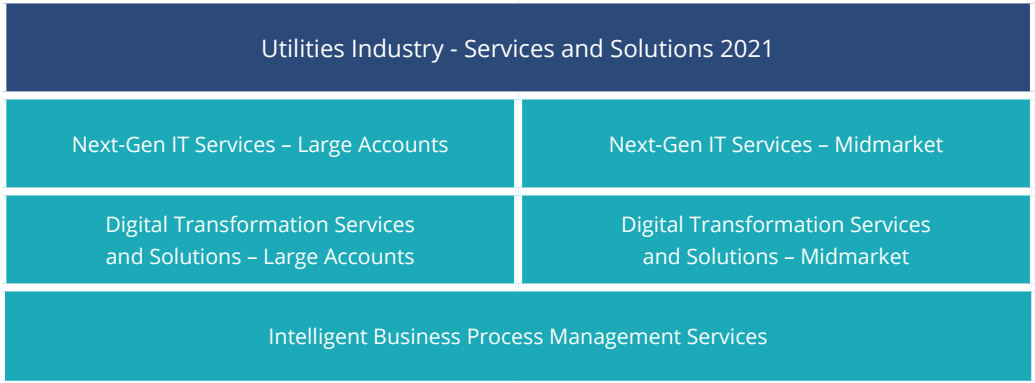
With the rapid digitization and increased investments in modernizing grid and IT-OT systems, the utilities industry is seeing more digital transformation sourcing engagements compared to traditional IT managed services and business process management (BPM) deals. Furthermore, digital transformation deals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

Next-Gen IT Services – Large Accounts

This report is relevant to enterprises in the utilities industry in North America for evaluating providers of next-generation IT services.

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

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

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

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

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

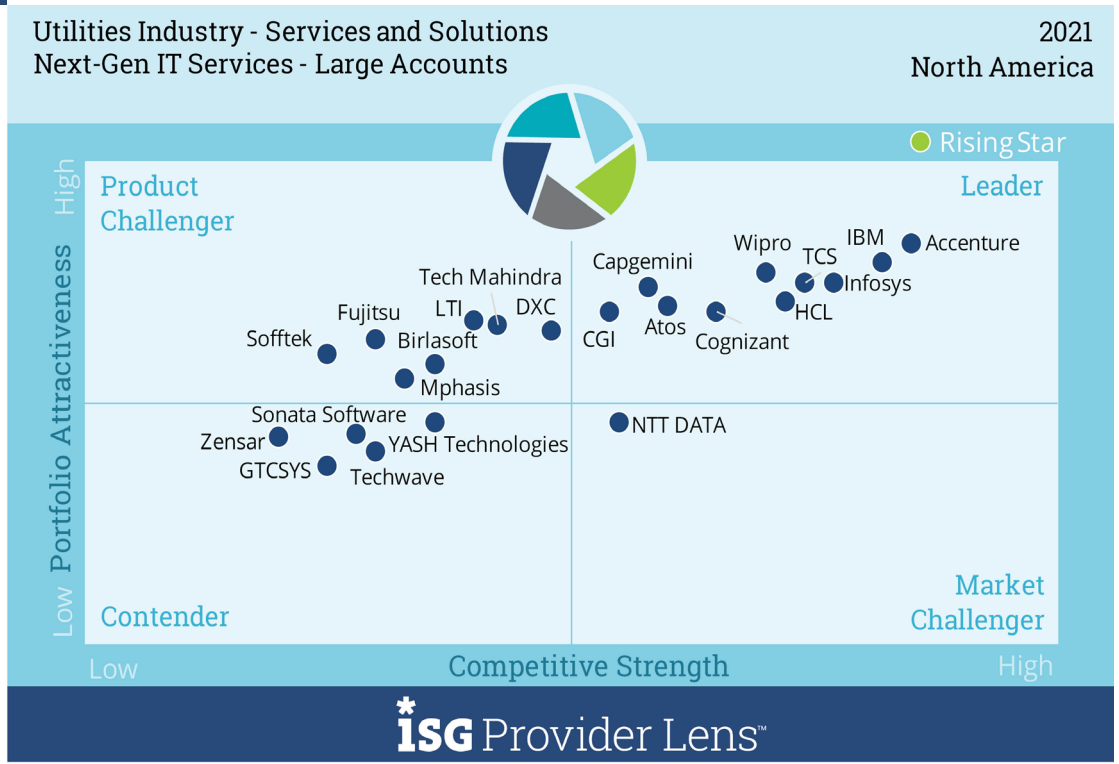
Sourcing and vendor management professionals should read this report to understand the provider ecosystem for next-generation IT solutions and services in North America and gain insights into how providers compare to one another.

ISG Provider Lens™

NEXT-GEN IT SERVICES – LARGE ACCOUNTS

Definition

This quadrant assesses providers that offer IT managed services, including application development and maintenance (ADM) services, infrastructure services (data center, cloud, network, workplace and security) and systems integration services (including new application development) to large utilities clients across the value chain that may include emerging technologies such as automation, analytics and AI and IoT. Large utilities clients typically have more than 750,000 customers, over 5,000 employees and revenues of more than US$2 billion.
The services are aimed at enabling utilities companies to increase productivity and efficiency, ensure compliance, minimize costs, optimize assets and maximize customer satisfaction.



Source: ISG Research 2021

NEXT-GEN IT SERVICES – LARGE ACCOUNTS

Eligibility Criteria

Service providers must:

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

Service providers should have:

- Deep domain knowledge of the utilities industry and local regulatory and compliance requirements
- Knowledge of how to leverage emerging technologies, including automation, analytics, IoT, AI, cybersecurity solutions, cloud and blockchain
- Established or emerging partnerships with industry associations, regulatory bodies, technology firms and startups in the utilities industry
- Experience in large transition projects that include merged companies and modernization of systems and applications in the industry
- Referenceable utilities case studies

Observations

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

NEXT-GEN IT SERVICES – LARGE ACCOUNTS

Observations

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

INFOSYS

Overview

Infosys is a global consulting and IT services company established in 1981 and headquartered in Bangalore, India. The company is considered India's second-largest IT services firm, with more than 240,000 employees, operations in 46 countries and US$12.8 billion in annual revenue. For FY2020, Infosys' revenue from the utilities industry grew by 29 percent, with 60 percent of its business coming from North America.

Strengths

Numerous client case studies: Infosys has several client case studies and references that are publicly available to showcase its utilities offerings. These provide details on its next-generation IT and transformation offerings for specific business use cases. Exhibited through several successful projects across the utilities value chain, this approach has helped Infosys in expanding its client base. Some of the main utilities customers in North America include large investor-owned utilities (IOUs) in large states including California, New York, New Jersey, Florida, Phoenix, Georgia, Illinois and others.

Pricing flexibility: Infosys is one of the few service providers in the region that largely model client engagements in next-generation IT services around non-traditional pricing practices, such as transaction-based or outcome-based pricing. More than 70 percent of its engagements with North American utilities clients are based on outcome-based, profit-sharing and risk-sharing commercial models. Such pricing models have a direct impact on the revenues of both clients and providers and help ensure a successful delivery.

Established partner ecosystem: Infosys has a vast partner ecosystem in the utilities market, comprising enterprise platforms (e.g., Oracle, SAP, Maximo®), hyperscalers (e.g., AWS, Microsoft, Google, IBM), startups and academia (e.g., Stanford, Purdue University). These partnerships bolster the company's transformation capabilities and ensure expertise and value in its next-generation IT service offerings for utilities clients.

Caution

Compared to its competitors, Infosys should focus on further expanding its utilities client base in Canada and Mexico. The company has headroom to increase its market share in those countries.

2021 ISG Provider Lens™ Leader

Infosys' visionary industry focus, flexible, outcome-driven engagement models, robust partner ecosystem and proven excellence in delivering transformation at speed, scale and security make it a popular choice for energy and utilities clients in North America.

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.

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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.

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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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