Power and Utilities Industry — Services and Solutions

A research report comparing provider strengths, challenges and competitive differentiators

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The power and utilities industry is transforming significantly due to sustainability mandates, operational pressures and customer-centered services. Key trends focus on decarbonization, operational efficiency and robust infrastructure development. The decarbonization dialogue has evolved to encompass a diverse energy mix essential for achieving net zero goals, integrating renewable energy, electric vehicles (EVs) and low-carbon technologies such as nuclear energy. Regulatory frameworks align more with engineering realities, facilitating data-driven and pragmatic transitions in energy sectors. Generative AI (GenAI) is increasingly used by utility executives to enhance operational efficiency, improve decision making and streamline customer service. However, successful integration requires a balance between human expertise and AI insights to avoid process complications.

Utilities prioritize capital investments to bolster grid resilience, implementing advanced management systems while addressing urgent technology upgrades by migrating to cloud-based solutions. As consumer e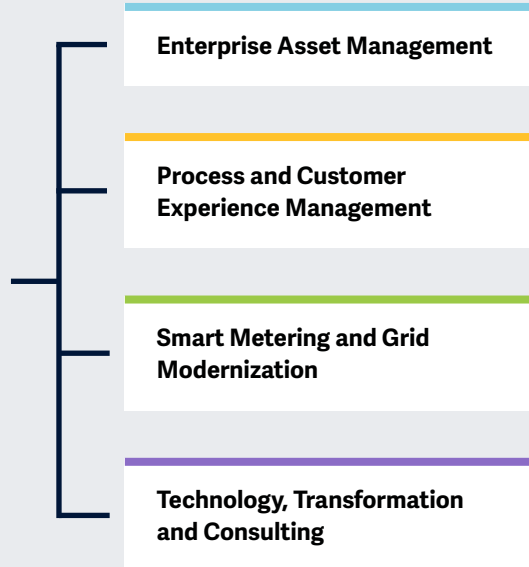xpectations shift, utilities must renew their customer engagement strategies, embracing innovations to tailor services in a data-driven manner. Workforce challenges persist, necessitating continuous adaptation of hybrid work models and retention strategies to meet operational needs and employee preferences. Promoting collaboration between IT and other departments will foster a conducive environment for innovation.

By adopting cooperative approaches and prioritizing customer-centric solutions, utilities can build a sustainable and resilient energy system to address today's demands while preparing for future needs.

This study aims to understand the **power and utilities industry's challenges** and assess provider capabilities to address enterprise needs.
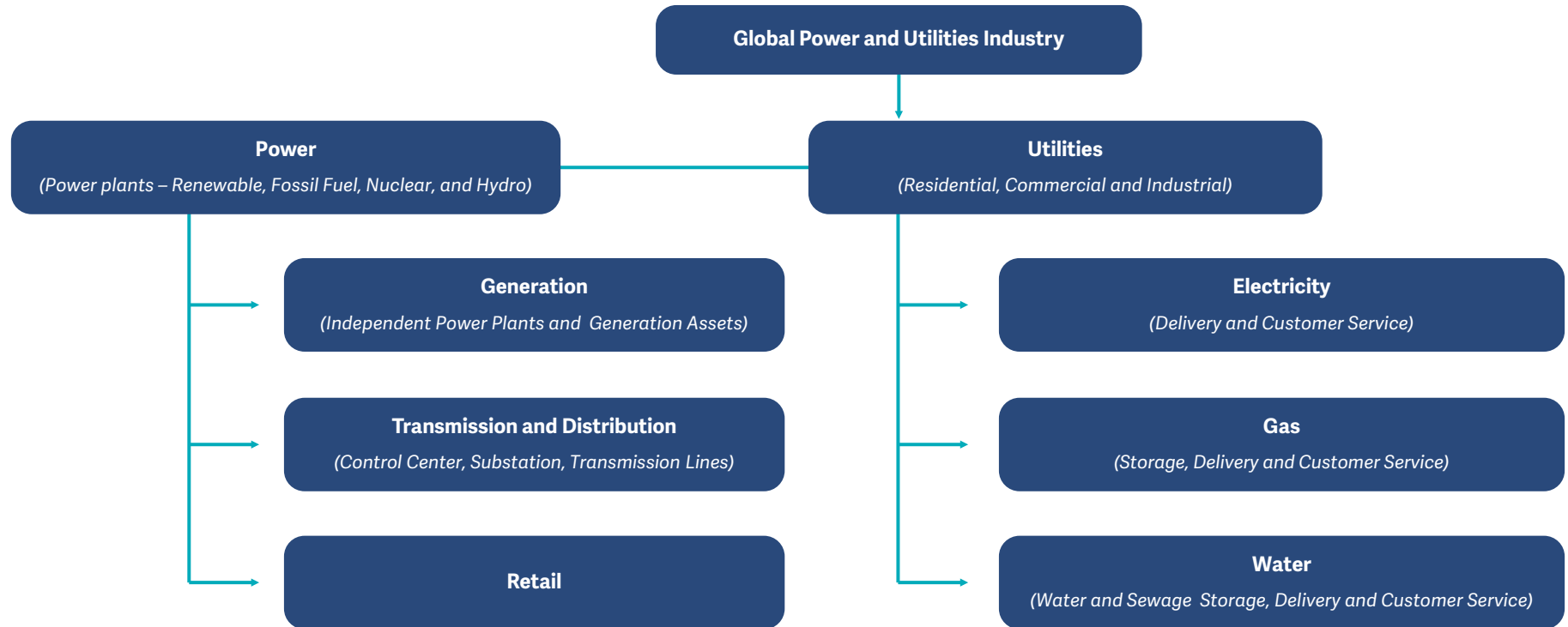
Simplified Illustration Source: ISG 2025

Enterprise Asset Management

Process and Customer Experience Management

Smart Metering and Grid Modernization

Technology, Transformation and Consulting

The ISG Provider Lens® Power & Utilities Industry — Services and Solutions 2025 study offers the following to business and IT decision makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness
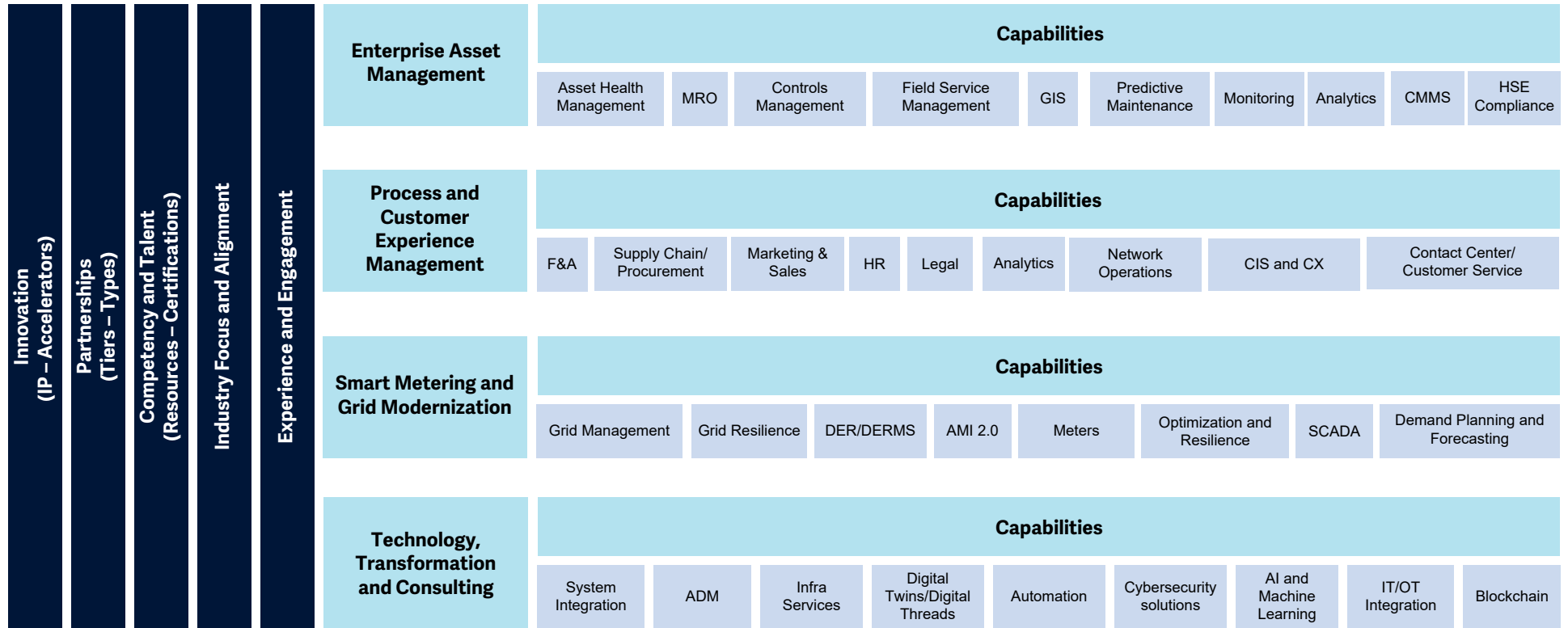- Focus on different markets, including North America and Europe

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.

Power and Utilities Industry Structure

Global Power and Utilities Industry

Power

(Power plants – Renewable, Fossil Fuel, Nuclear, and Hydro)

Utilities

(Residential, Commercial and Industrial)

Generation

(Independent Power Plants and Generation Assets)

Electricity

(Delivery and Customer Service)

Transmission and Distribution

(Control Center, Substation, Transmission Lines)

Gas

(Storage, Delivery and Customer Service)

Retail

Water

(Water and Sewage Storage, Delivery and Customer Service)

Blueprint of Power & Utilities Industry

Innovation (IP – Accelerators)

Partnerships (Tiers – Types)

Competency and Talent (Resources – Certifications)

Industry Focus and Alignment

Experience and Engagement

Enterprise Asset Management

Capabilities

Asset Health Management	MRO	Controls Management	Field Service Management	GIS	Predictive Maintenance	Monitoring	Analytics	CMMS	HSE Compliance

Process and Customer Experience Management

Capabilities

F&A	Supply Chain/ Procurement	Marketing & Sales	HR	Legal	Analytics	Network Operations	CIS and CX	Contact Center/ Customer Service

Smart Metering and Grid Modernization

Capabilities

Grid Management	Grid Resilience	DER/DERMS	AMI 2.0	Meters	Optimization and Resilience	SCADA	Demand Planning and Forecasting

Technology, Transformation and Consulting

Capabilities

System Integration	ADM	Infra Services	Digital Twins/Digital Threads	Automation	Cybersecurity solutions	AI and Machine Learning	IT/OT Integration	Blockchain

*Non-exhaustive

Enterprise Asset Management

Definition

This quadrant assesses providers offering enterprise asset management (EAM) services and solutions to enterprises in the power & utilities industry. 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 services and remote monitoring. These services enable enterprises to increase asset performance, extend their useful life and reduce operational costs.

Many service providers explore M&A and develop proprietary EAM platforms to offer industry-specific solutions. These platforms use technologies such as digital twins, AR, VR, mixed reality (MR) and 3D technology in asset management. Field service management and workforce management are also key areas within asset management.

Eligibility Criteria

1. EAM **experience in the regional power & utilities** industry
2. **Successful EAM projects** with **at least two to three** power & utilities firms
3. Offerings in at **least three areas** below:
   - Asset performance management
   - Asset lifecycle management
   - Failure prediction
   - Geographic information system
   - Digital EAM solutions based on AI and ML
   - Work and labor management, including health, safety and environment (HSE)
   - Supply chain transformation management
   - Computerized maintenance management system
   - Controls management
   - Warranty management
   - Inventory and spare parts management
   - Analytics and reporting
   - Field services management
   - Work order management
4. Expertise in **next-generation technologies** — automation, analytics, IoT, AI, cybersecurity, cloud and blockchain
5. **Partnerships** with industry associations, regulatory bodies, technology firms and power & utilities startups
6. **Referenceable case studies** for services/solutions across the value chain in key areas such as **AI, GenAI and other new age technologies**

Process and Customer Experience Management

Definition

The quadrant assesses service providers that offer intelligent business process management services (iBPMS) and meter-to-cash (M2C), customer service and customer information systems (CIS) to the power & utilities industry. Automation, AI and analytics drive these services and include customer services (both front office and back office, B2B and B2C), sourcing and procurement, human resources, finance and accounting (F&A), regulatory and compliance, knowledge services, master data management, field workforce services and supply chain management. These services enable client enterprises to improve efficiency and productivity in daily operations and business processes (front, middle and back office), enhancing CX and decision-making.

Other services include order processing, rate design, billing, credit and collections, payment processing, contact services (call center) and interactive voice response (IVR) that drive consumer engagement and relationship management, enhancing CX.

Eligibility Criteria

1. **Offer a combination (if not all)** of the following to enterprises **across the value chain** with expertise in the assessed region:

   ○ End-to-end business process management

     • Workflow visualization, design, execution, monitoring and optimization

     • Real-time process architecture mapping and modification capabilities

   ○ F&A and BPO services

   ○ Meter to cash solutions

   ○ HRM

   ○ Field services management

   ○ Demand response management

   ○ Rule engine orchestrator

   ○ Compliance management

   ○ AI-driven process automation

   ○ Regulatory and compliance management

   ○ Supply chain and procurement

   ○ Customer information and billing

   ○ Personalized customer engagement

   ○ Customer support and issue resolution

   ○ Customer onboarding and qualification

   ○ Feedback and continuous improvement

   ○ Program and partner management

   ○ Sustainability and ESG reporting

2. Experience in **optimizing business processes** for leading firms

3. Expertise in applying advanced technologies, including automation, analytics, IoT, AI, cybersecurity, cloud and blockchain

4. **Partnerships** with industry associations, regulatory bodies, technology firms and power & utilities startups

5. **Referenceable case studies** for services/solutions across the value chain in key areas such as **AI, GenAI and other new age technologies**

Smart Metering and Grid Modernization

Definition

This quadrant assesses service providers offering grid modernization and related services and smart meter solutions that measure and record electricity, gas or water consumption for the power & utilities industry. Grid management services include grid modeling, distributed energy resources management systems (DERMS), advanced distribution management systems (ADMS), geographic information systems (GIS), volt-var optimization (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, billing and real-time monitoring. These management offerings lead to an improved, reliable and optimized grid infrastructure. Smart metering solutions enable accurate readings, remote data access and insights into consumption patterns, leading to greater energy efficiency and cost savings for consumers and utilities.

Eligibility Criteria

1. Experience in **grid modernization** consulting and implementation

2. Successful **grid modernization projects** with at least two to three power and utilities firms

3. Offerings **in more than one** of the following:

   - AMI deployment
   - Meter data management
   - Customer engagement and portal services
   - Prepayment and flexible billing solutions
   - Remote disconnection/reconnection
   - Demand response enablement
   - Data analytics
   - Regulatory compliance services
   - Distribution automation
   - Grid assessment and road mapping
   - ADMS
   - DERMS
   - GIS
   - Grid hardening and asset management
   - Grid stability and wide-area monitoring
   - Protection and control systems modernization
   - Cybersecurity for critical infrastructure
   - Integration of prosumers and electric vehicles
   - Volt/Var optimization and control
   - Peak load management and automated alerts
   - Sustainability and emissions reporting

4. Expertise in **next-generation technologies** — automation, analytics, IoT, AI, cybersecurity, cloud and blockchain

5. **Partnerships** with industry associations, regulatory bodies, technology firms and power & utilities startups

6. **Referenceable case studies** for services/solutions across the value chain in key areas such as **AI, GenAI and other new age technologies**

Technology, Transformation and Consulting

Definition

This quadrant assesses providers that offer consulting and digital transformation services that help power and utilities companies modernize and transform their IT infrastructure to streamline operations, improve efficiency and support business transformation initiatives. The services include application development and maintenance (ADM), infrastructure services (data center, cloud, network, workplace and cybersecurity) and systems integration for new applications across the value chain. These services enable utilities to increase efficiency, ensure compliance, minimize costs, optimize assets and maximize customer satisfaction.

IT consulting and solutions in utilities use data, cloud and AI to improve efficiency and CX. Utilities aim to achieve transformation by simplifying processes and extensive reengineering, using digital tools and methodologies that align with their strategic objectives to improve revenue, optimize costs, achieve operational excellence and enhance business process efficiency.

Eligibility Criteria

1. Initiatives in **business and operations strategy**, change management and end-to-end transformation

2. Experience in **reorganizing IT operating models** to align with changing business demands (GCCs, nearshoring, offshoring, agility and others)

3. **Offer a combination (if not all)** of the following to enterprises across the value chain, with expertise in the assessed region:

   - Net zero and decarbonization strategy

   - Regulatory, compliance and market design advisory

   - Digital strategy and road map development

   - Cloud migration and infrastructure modernization

   - Enterprise data management and analytics platforms

   - AI and ML integration

   - Workforce digital enablement solutions

   - Change management

   - Training, onboarding and knowledge automation

   - GenAI for digital twin and asset optimization

   - Blockchain for energy trading and grid transactions

   - ERP

   - M&A advisory

   - Operational consulting

   - Robotics and automation

   - Industry 4.0 initiatives (IT/OT integration)

   - Cybersecurity and OT security

4. **Partnerships** with industry associations, regulatory bodies, technology firms, and power & utilities startups

5. **Experience in large transition projects** that include post-merger integration, business transformation and cybersecurity

6. **Referenceable case studies** for services/solutions across the value chain in key areas

Quadrants by Region

As a part of this ISG Provider Lens® quadrant study, we are introducing the following four quadrants in the Power & Utilities Industry – Services and Solutions 2025 report:

Quadrant	North America	Europe
Enterprise Asset Management	✔	✔
Process and Customer Experience Management	✔	✔
Smart Metering and Grid Modernization	✔	✔
Technology, Transformation and Consulting	✔	✔

ISG's Power and Utilities Framework

Key characteristics of the proprietary framework:

- Encapsulates the major Power & Utilities topics that enterprises need to think about
- Helps headline providers' digital solutions
- Inner tiles represent themes of enterprise objectives
- Outer tiles represent initiatives
- Behind each outer tile is a specific set of capabilities, with unique market leading providers and solutions

Schedule

The research phase falls in the period between July and September 2025, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in January 2026.

Milestones	Beginning	End
Survey Launch	July 2, 2025	
Survey Phase	July 2, 2025	August 4, 2025
Sneak Preview	October 2025	Dececmber 2025
Press Release & Publication	January 2026	

Please refer to the **ISG Provider Lens® 2025** research agenda to view and download the list of other studies conducted by ISG Provider Lens®.

Access to Online Portal

You can view/download the questionnaire from here using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

Buyers Guide

ISG Software Research, formerly "Ventana Research," offers market insights by evaluating technology providers and products through its Buyers Guides. The findings are drawn from the research-based analysis of product and customer experience categories, ranking and rating software providers and products to help facilitate informed decision-making and selection processes for technology.

In the course of the Power and Utilities Industry – Services and Solutions IPL launch, we want to take advantage of the opportunity to draw your attention to related research and insights that ISG Research will publish in 2024. For more information, refer to the Buyers Guide research schedule.

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.

ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of "Voice of the Customer." The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers' success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to nominate their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence™ will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ website.

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:
star@cx.isg-one.com

ISG Star of Excellence

Methodology & Team

The ISG Provider Lens® 2025 – Power and Utilities – Industry Services and Solutions research study analyzes the relevant software vendors/service providers in the North America, Europe markets, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Study Sponsor:
Iain Fisher

Lead Analysts:
Swadhin Pradhan and Harish B

Research Analyst:
Mamtha R

Data Analyst:
Rajesh MC

Project Manager:
Shreemadhu Rai B

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The research and analysis presented in this study will include data from the ISG Provider Lens® program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

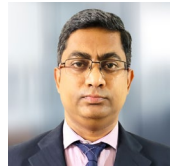All revenue references are in U.S. dollars ($US) unless noted.

Contacts For This Study

Study Sponsor

Iain Fisher

Program Director

Swadhin Pradhan

Lead Analyst – North America

Harish B

Lead Analyst – Europe

Mamatha R

Research Analyst – North America and Europe

Rajesh MC

Data Analyst

Shreemadhu Rai B

Senior Project Manager

ISG Provider Lens® Advisors Involvement Program

ISG Provider Lens offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three advisors participate as part of each study's quality and consistency review team (QCRT). The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires,

- Advise on service provider inclusion, participate in briefing calls,

- Give their perspectives on service provider ratings and review report drafts.

ISG Advisors to this study

Jon
Brock

Account Director – Energy and Utilities, US

Korey
Barnard

Partner – Energy and Utilities, US

Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

* Rated in previous iteration

1st choice LLC	Ampcus Inc.*	Bonitasoft	CommeVersion
ABC Technology Services	Arcadis Gen Holdings Limited	Bosch SDS	Concentrix*
ABI Advantage LLC	Archipelago Strategies Group, Inc.	Boston Change Management Partners, LLC	Conduent
Absolute Information Technologies Inc	ARQ Group*	BP Logix	Continuum Global Solutions
Accenture*	Arvato Systems	Bursys	Core Environmental Consultants, Inc.
Acquire BPO*	ASG	CAI	Credera
Adactin	Asseco Group	Capgemini*	Cube Enterprise
Aerodyne Group	Atento	CAPITA	Cyient*
AESolutions LLC	Atkins Realis*	Caresoft Global	Daffodil Software
Afry	Atos*	Cascadia Consulting Group, Inc.	Deloitte*
Akkodis	Bahwan Cybertek	Centum	Driivz
Alectra Energy Solutions	Baringa	CGI	DXC Technology*
Alorica*	BIP Group	CMS IT Services	EDAG
Altair	Birlasoft*	Coforge*	eInfochips
ALTEN	BITHGROUP Technologies, Inc.	Cognizant*	Encora

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* Rated in previous iteration

Endava	Fujitsu*	KPMG*	NTT DATA*
Engineering Industries eXcellence	Genpact*	Kyndryl*	Orange Business
Ensono	Globant	Leidos	PA Consulting
EOSGlobe Inc.	GNC Consulting, Inc.	Liveops, Inc.	Paradigm Technology
E-Source	GTCSYS	LTIMindtree*	Perficient*
EXL*	Happiest Minds*	LTTS	Premiere Consulting Group
Expert callers	HCLTech*	Lumen Technologies*	Probe CX*
Expleo	Hexaware Technologies	Mastek	PS Energy
EY*	Hitachi Digital Services*	Microland*	PS2G
e-Zest/Accion Labs	Huron Consulting	Mphasis	Publicis Sapient
Fairland Company, Inc., The	IBM*	Nagarro*	PwC*
Firstsource	Infosys*	Naviam	Qualitest*
Foundever	Innova Solutions	NEC Corporation	Quest Global
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Rivera Consulting, Inc.	T Systems	WNS*
RPS Group	TCS*	World Wide Technology Inc.*
rSTAR Technologies	Tech Mahindra*	YASH Technologies
Serco*	Techwave	Zones*
Sigma	Teleperformance*	
SII	The Ascent Group, Inc	
Softdel	The Canton Group	
Softserve	The Silicon BlackGroup	
Softtek	TietoEVRY*	
Sopra Steria*	TMG Consulting	
SP Group	Trinity Technical Solutions	
Stefanini	Utilidata, Inc	
Sutherland	V2Soft, Inc.	
Synch-Solutions	VDART, Inc.	
Synoptek	Wipro*	

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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The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

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