

Telecom, Media and Entertainment Services

An analysis of the service providers in the North American telecom, media and entertainment industry



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Over the last couple of years, telecom, media and entertainment enterprises have navigated through inflation, continued competition, layoffs and disruption of business models. With the widespread rollout of 5G and fiber-to-the-x (FTTx), growth in data traffic continues unabated. Enterprises are balancing variety, accessibility and quality of content with freemium models. Technological advancements have also reduced data carriage costs, accommodating users in a regulated industry where spectrum is always scarce. **More for less** has been the operating mantra of the sector.

As enterprises compete and cooperate for the same price-conscious subscriber, the need for **One Platform, One Bundle and One Subscription** has become paramount with **product simplicity and consistent service quality**.

In a hybrid or multicloud setup, tight coupling between business, network and IT teams becomes critical as enterprises transition from a traditional NetCo to a TechCo. An integrated data platform that leverages AI- and ML-based

end-user and network data is crucial. This platform, or the digital twin of the network, has several benefits:

- **Orchestrates and assures made-to-measure plans** using federated data and dynamic query tools
- **Enables auto-discovery** among active network elements from various vendors for **single-pane-of-glass observability**
- **Enables self-serve capabilities** as enterprises evolve from an engagement-first to a delight-first approach

The need for collaborative R&D, **up-skilling** and **cross-border talent movement** remains pertinent. With joint standards development, cloud-led alliances and interoperable assets, investments in **cybersecurity** will become inevitable.

Lastly, **environmental, social and governance (ESG) reporting** has become a norm that enforces sound corporate governance, carbon and bribery reporting, supply chain performance and diversity inclusion.



The 2023 study reflects the developments and competitive insights in the North American **telecom, media and entertainment IT and BP services market.**

Simplified Illustration Source: ISG 2023

Telecom Intelligent Business Process Services (BPS)

Telecom Managed and Next-Gen IT Services (ITS)

Media and Entertainment Intelligent Business Process Services (BPS)

Media and Entertainment Managed and Next-Gen IT Services (ITS)

Scope of the report

The ISG Provider Lens™ North America Telecom, Media and Entertainment study examines a comprehensive range of service provider capabilities and services in the telecom, media and entertainment verticals. It provides competitive intelligence and critical decision-making insights into provider positioning. The analysis helps ISG advisors and enterprise clients evaluate vendor relationships and potential engagements.

The 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
- A perspective on the U.S. and Canada (North America) market

Our study serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. From software development and application support to database administration and support, networks and infrastructure, and cybersecurity and ESG, ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential engagements.



Telecom Intelligent Business Process Services (BPS)

Definition

This quadrant assesses providers that offer BPS to clients from the telecom industry and are keen on outsourcing their operations from the backend to the frontend of their business, including finance, accounting, HR, procurement, logistics and customer care. Telecom service providers use AI-, ML- and analytics-based BPS to enhance operational efficiency, improve CX and/or boost their opportunity to upsell and cross-sell. In addition to data collation and insights generation, BPO services include customer engagement services such as call center, customer due diligence, dynamic FAQ and chatbots. BPS includes audit, assurance, risk and compliance, surveillance, quality, change management, project management, transformation planning, experience design services, application support and maintenance and related areas.

Cost management, optimizing business performance, security, and privacy are key drivers for BPS deals. Even as BPS players have graduated to providing standardized solutions with AI and ML into core service lines, the use of platform-based models and design thinking or consulting is accelerating the service delivery of use cases related to analytics, automation and accuracy. Hence, operational efficiency and business resiliency are combined with cloud, data, hyperautomation, and analytics in diversified delivery centers.

Eligibility Criteria

1. Offer a combination of services across order processing, account management, billing, call center, dynamic FAQ, fraud, chatbot technology and relationship management
2. Have dedicated and **cross-trained FTEs** in areas such as cybersecurity, process mining, AI, ML and data sciences
3. Handle outsourced BPS projects from the wider industry and segments such as Unified Communications and Collaboration (UC&C), Communications Platform as a Service (CPaaS), software-defined wide area network (SD-WAN), radio access network (RAN) and contact center
4. Illustrate certifications across data, AI, ITSM, security, process and standards, product and quality
5. Demonstrate **AI and analytics capabilities** (for example, translation and transcription with generative AI)
6. Provide OSS/BSS tool support with functional expertise in **security, HR, F&A, compliance and risk**
7. Offer referenceable case studies



Telecom Managed and Next-Gen IT Services (ITS)

Definition

This quadrant assesses service providers that offer IT outsourcing services to telecom industry clients. Providers evaluated in this quadrant manage the critical network infrastructure and applications to reduce TCO, build automated products and solutions, and improve the quality of services and CX. Key services that ISG has deemed essential for service providers to extend to their clients include:

- Consulting services
- Network services such as provisioning, orchestration and optimization
- Application development services such as agile, AIOps, cognitive open APIs, DevOps/continuous integration and continuous delivery (CI/CD), CX, quality assurance, microservices and RPA
- Cloud and infrastructure enablement services, including migration to the telco cloud and containers

- OSS/BSS managed services that include fault management, inventory management, change management, performance management and vendor management
- Add on services such as security, data analytics, and other maintenance and support activities

Alliance partners will be crucial to co-develop, co-innovate and co-market capabilities in a fiercely competitive market. Hence active network-sharing, field force edge services, Industry 4.0 automation, Wi-Fi coupled with 5G fixed wireless access (FWA), Open radio access network (RAN), neutral-host private networks, multi-operator SD-WAN and other technologies will need a sustainable, transparent and software-driven approach. New offerings in the converged core, real-time cloud-based networking, AI-led edge distribution, and open and automated network sensing and scaling with trust-driven partner apps are key differentiators. These enable a seamless transition from a traditional connectivity provider to an experience provider.

Eligibility Criteria

1. Offer a **combination of IT outsourcing services** such as network management, application management, operations support and infrastructure-managed services to clients from the telecom industry
2. Illustrate **certifications** across data, AI, ITSM, cloud, security, virtualization, process, product or quality
3. Handle outsourced IT projects across **UC&C, CPaaS, network operations, software domains and enterprise IT** functions
4. Demonstrate extensive expertise in areas such as **5G services**, open and software defined networking (SDN), network function virtualization (NFV)
5. Demonstrate strategic partnerships with **hyperscalers** to help clients implement the telco cloud and showcase ROI for generative AI
6. Demonstrate integration capabilities with **OEMs** such as Cisco, VMWare, Red Hat, AltioStar Networks, Mavenir and Ericsson
7. Offer **cybersecurity** services
8. Provide referenceable **case studies**



Media and Entertainment Intelligent Business Process Services (BPS)

Definition

This quadrant assesses service providers that offer BPS to clients from the media and entertainment industry. Providers in this quadrant manage clients' business operations across the media value chain, including finance, accounting, HR, procurement, logistics and customer care. Key services that ISG has deemed essential for service providers to extend to its clients include:

- Backend enterprise services such as account management, content packaging, billing and revenue management, order processing and service level management
- Frontend customer services such as call center, chatbots, dynamic FAQ and relationship management, advertising inventory management, analytics and reporting, click-through behavior and sales automation
- Content royalty and rights management services such as legal contract standardization and governance; content lifecycle management services such as acquisition, curation and customization

- Enterprise support, including risk, strategy, IT infrastructure library (ITIL), HR and knowledge management support services

Simplification of content search and accessibility has been a major trend in increasing the net promoter score (NPS). Generative AI use cases in content generation, customer service, content recommendation and monetization are also being explored. In short, operational profitability, content personalization, subscriber privacy and secured partner onboarding resonate with media and entertainment enterprises. Hence, capacity monitoring alerts, SLA and change management, packaging format support, audit and log management, cataloging and real-time invoicing, authorization and authentication support, proactive problem handling and account management, and reporting analytics are crucial support functions.

Eligibility Criteria

1. Offer a combination of services, including **backend and frontend customer services**, royalty and rights management, analytics, content lifecycle management and AI, **analytics, cloud and security** for the North American market
2. Dedicated **full-time employees (FTEs)** that are technically trained or certified in areas such as cybersecurity, content, augmented reality (AR)/ virtual reality (VR) and generative AI and ML
3. Demonstrate knowledge in processes associated with **programmatic ad-generation, intelligent content packaging and discovery**, UI and UX with

premiumization, gamification and tokenization characteristics, supported by technologies such as blockchain, generative AI and analytics

4. Portray **ESG and security focus**
5. Ability to leverage various storage, software and hardware vendors and provide clients with **managed and professional IT services**
6. Offer referenceable case studies for various services



Media and Entertainment Managed and Next-Gen IT Services (ITS)

Definition

This quadrant assesses service providers that offer IT outsourcing services to clients from the media and entertainment industry. Today, the industry aims to provide a truly connected, intuitive, seamless journey to customers. Further, intermittently optimized programmatic advertising yields a suboptimal return on marketing investment and also needs retargeting for offline transactions. Cloud, ML, behavioral, personality and attribution analytics, and optimization are immediate opportunities. Providers evaluated in this quadrant manage and improve the performance of media enterprises' network IT services infrastructure and CX. By outsourcing the network, customer and service components, media and entertainment enterprises have more scope to innovate and offer high-quality products. Apart from the consulting services that form the long tail of ITS, key services that ISG has deemed essential for service providers to extend to their clients include:

- Content delivery network (CDN) services such as automation, optimization and provisioning, along with rating and recommendation engines
- Edge computing services
- Application development and management services such as agile, AIOps, cognitive, DevSecOps/CI/CD, test-driven development and automation, microservices architecture-led approach with API integration for catalogs and RPA for workflows related to content ingestion and media streaming apps
- Cloud-managed and enabled services for media streaming
- CX services with intuitive and experiential UI/UX services with a focus on quality assurance

Eligibility Criteria

1. Offer a combination of IT services, which include application maintenance and development in North America
2. Have extensive domain expertise with industry certifications and PoCs in areas such as **content creation, packaging, discovery, distribution and consumption**
3. Place high importance on data with increased AI use to automate flows
4. Demonstrate strategic partnerships with **hyperscalers, CDNs, data center hosting companies, alliance partners** and other niche players to implement cloud- and video-based solutions
5. Offer **cybersecurity services** to mitigate data theft and protect consumer interests and data
6. Ability to offer referenceable case studies that illustrate how IT outsourcing services improved the service quality, reduced churn, and **increased efficiency, simplicity and UI/UX**
7. Illustrate lower TCO, faster increased efficiency, simplicity and better UI/UX time to market, security, flexibility and scalability



Quadrants by Region

As a part of this ISG Provider Lens™ quadrant study, we are introducing the following four quadrants in the ISG Provider Lens™ Telecom, Media and Entertainment vertical services report for the U.S. and Canada geographies (North America).

Quadrant	North America (U.S. & Canada)
Media and Entertainment Intelligent Business Process Services (BPS)	✓
Media and Entertainment Managed and Next-Gen IT Services (ITS)	✓
Telecom Intelligent Business Process Services (BPS)	✓
Telecom Managed and Next-Gen IT Services (ITS)	✓



The research phase falls in the period between July and September 2023, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in January 2024.

Milestones	Beginning	End
Survey Launch	July 18, 2023	
Survey Phase	July 18, 2023	August 18, 2023
Sneak Previews	November 2023	
Press Release & Publication	January 2024	

Please refer to the [link](#) to view/download the ISG Provider Lens™ 2023 research agenda.

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!

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:

ISG.star@isg-one.com



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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



Jeff
Cosby

**Partner,
Media, Technology, &
Software Services**



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

Accenture*	Cognizant*	Fujitsu	ITC Infotech
Accolite	Computacenter	Genpact*	KPIT
Agilisium	Concentrix	Globant	KPMG
Amdocs	Conduent	Grid Dynamic Holdings	Kyndryl
Atento	CSG	Happiest Minds	LTIMindtree*
Atos*	Cyient	HCLTech*	LTTS
Axians	Dell	Hexaware	Lumen Technologies
Beyondsoft	Deloitte	HGS	Luxoft
Birlasoft*	DXC Technology*	Hitachi	Movate
Brillio	EPAM*	HPE	Mphasis
Capgemini*	Eviden	IBM	NEC
Capita	Exela Technologies*	Indra	NIIT Technologies
CGI	EXL*	Infosys*	NTT DATA
CI&T	EY	Intive	Oracle
Coforge	FirstSource	Invensis	PDG Consulting



Invited Companies

Perficient
Persistent*
Prodapt
Protiviti
Publicis Sapient
PwC
Rackspace Technology
Ranosys
Sasken
SG Analytics
Sutherland*
Tata Communications
Tata Elxsi
TCS*
Tech Mahindra*
Teleperformance*
ThoughtWorks
Tietoenvy
To the New
T-Systems
Unisys
UST
Verint Systems
Virtusa*
WidePoint Corporation
Wipro*
WNS*
Zensar



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](#).

iSG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: [Public Sector](#).

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ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 900 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.



JULY, 2023

REPORT: TELECOM, MEDIA AND ENTERTAINMENT SERVICES