

Telecom, Media and Entertainment Industry Services

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



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The telecom, media and entertainment (TME) industry has faced persistent competition and disruptions to business models in the past. Data traffic is growing exponentially due to the widespread deployment of 5G and fiber-to-the-x (FTTx). Businesses are using freemium models to balance content quality and accessibility metrics. In a regulated market where spectrum is always in short supply, technological developments have lowered the data carriage costs, thereby accommodating demand with hyperefficient operations.

In today's competitive landscape, where companies fight for the same price-sensitive customer, offering a simple, all-in-one platform with a single bundle and subscription is crucial. It ensures consistent service quality and a seamless subscriber experience.

As enterprises rapidly shift from traditional network operating models to technology-oriented models with cloud and GenAI constructs, close collaboration between the business, network and IT teams becomes paramount. The benefits of the shift include:

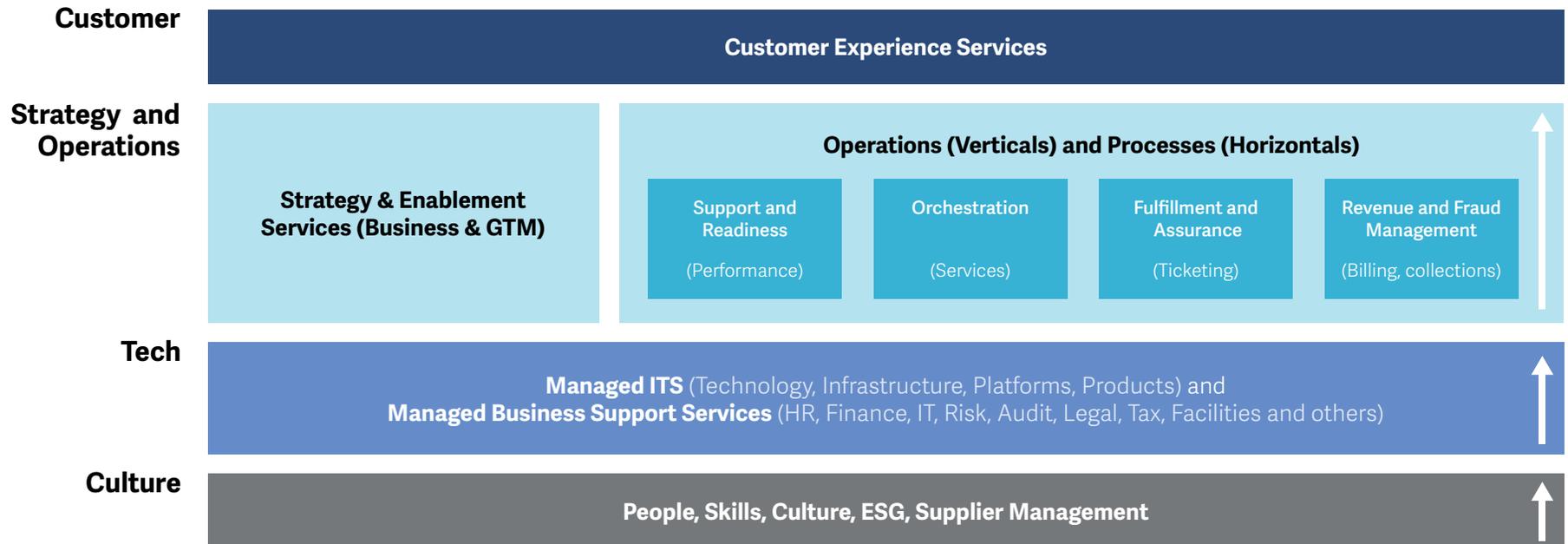
- Quality of service assurance by personalizing plans based on real-time network data and user behavior
- Automatic service provisioning and troubleshooting with AI and ML, including auto-discovery of network elements
- Managing subscriptions or troubleshooting connectivity issues with self-serve capabilities

The need for collaborative R&D, upskilling and cross-border talent movement remains pertinent. With joint standards development and open innovation, investments in cybersecurity will become inevitable.

Environmental, social and governance (ESG) reporting has improved corporate governance, regulatory compliance, supply chain performance, social responsibility and cost savings.



Telecom, Media and Entertainment Industry Functional Blueprint



Source: ISG, 2024



ISG's Media and Telecom Framework

- Encapsulates what enterprises are doing across the Media and Telecom market and helps connect them to the digital solutions
- Represents the entire value chain of supply and demand within the market
- 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

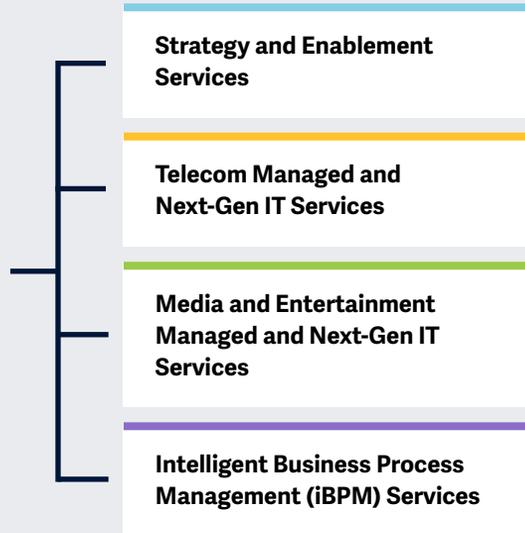


Specific to Media Ops

Source: ISG, 2024



This 2024 IPL study aims to understand key industry challenges and assess service provider capabilities to address unmet enterprise needs.



Simplified Illustration Source: ISG 2024

The ISG Provider Lens™ Telecom, Media and Entertainment Industry Services — 2024 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 EMEA

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.



Strategy and Enablement Services

Definition

This quadrant assesses providers offering strategic advisory services to telecom organizations across digital transformation, M&A, restructuring and business strategy, encompassing procurement, brand marketing and sales, finance and budgeting, pricing economics and operating models. These providers help design effective governance and operating models for investment strategies, align with the ever-evolving regulatory and spectrum landscape, simplify product portfolios for large-scale transformation, and consolidate core business to achieve network superiority, data-centricity, operational simplicity and cost optimization with ecosystem partners.

In addition to the above, strategizing and windowing content that attracts both advertisers and consumers is crucial for media and entertainment enterprises. This involves aligning various business models, such as subscription video on demand (SVOD), advertising-based VOD, transactional VOD and hybrid VOD, to accelerate advertisement growth with direct-to-consumer approaches,

supporting bids, managing rights and bargaining power, monetizing experiences and improving subscriber loyalty via technology modernization and organizational change.

Technology and advisory-driven services assessed under this quadrant include generous use of digital services such as generative AI (GenAI), IoT, 5G, edge computing, open radio access network (ORAN), AR and VR, automation, cyber security, blockchain, data analytics, Industry 4.0 and cloud computing.

The providers also focus on periphery services such as accounting, R&D, engineering, open innovation, taxation, talent management, including staff augmentation, upskilling, ESG support, global capability center (GCC) alignment and others for end-to-end support, including managed or on-demand clauses.

Eligibility Criteria

1. Provide direct strategic advisory services for the industry across small, midsize and large enterprises with proven **track records, reputation, domain knowledge and expertise**
2. Provide differentiated and balanced **advice on how technology can address business issues** and align with industry requirements
3. Offer industry-specific services across **policy, regulation and standards** across EMEA and North America with structured problem-solving capabilities
4. Deliver **new-age tools and technologies** and periphery support services
5. Demonstrate capabilities across **designing, adapting and implementing transformation programs** that **create ROI**
6. Communicate **transparent fee structure** with **flexible engagement models**, including security and confidentiality clauses
7. Demonstrate **case studies** that showcase alignment amongst services, resources, suppliers and customers



Telecom Managed and Next-Gen IT Services

Definition

This quadrant evaluates providers offering managed and next-gen IT services to telecom customers. These providers manage the critical network infrastructure and applications to lower TCO, build automated solutions and enhance CX. They are assessed in this quadrant based on the following criteria:

- Core IT infrastructure managed services that include network services such as provisioning, orchestration and optimization, monitoring, virtualization and troubleshooting, along with hardware and software maintenance
- OSS/BSS COTS and custom software and application management services that include license management; deployment and development services with Agile, AIOps, cognitive open APIs, DevOps, CI/CD, quality assurance, microservices and RPA methodologies; and fault management, inventory and change management, performance monitoring and assurance

- Cloud, data center and infrastructure enablement and management services, including migration to the telco cloud, disaster recovery, and deployment of containers for open and modular solutions
- Open networking and interface solutions with an engineering approach for in-building and outdoor or metro connectivity
- Add-on services such as security, compliance, AI (predictive and generative), data analytics, governance and other integration, maintenance and support activities

Alliance partners will be crucial to codevelop, co-innovate and comarket capabilities in a competitive market. Hence, active network-sharing, Wi-Fi with 5G interoperability, open radio access network (RAN) and multi-operator core networks will need a sustainable, transparent and software-driven approach. New offerings from the converged core and network slicing will need AI-led edge capabilities and automated network sensing techniques with trusted partner applications.

Eligibility Criteria

1. Offer a **combination of managed IT outsourcing services** with network and infrastructure management, application management, operations support and managed cloud services
2. Illustrate **certifications** across data, AI, ITSM, cloud, security, virtualization, process, product and quality
3. Directly manage IT estate with **predictable costs** and industry expertise in wireless and wireline domains
4. Demonstrate extensive expertise in areas requiring scalability, flexibility, **automation and modernization**
5. Demonstrate **strategic partnerships with hyperscalers and OEMs** for engineering open, cost-effective and flexible edge and cloud solutions with built-in security and compliance
6. Showcase **ROI for GenAI** and predictive AI use cases
7. Offer **help desk support** with a focus on automating core business operations using DevSecOps, data analytics, RPA
8. Provide referenceable **case studies**



Media and Entertainment Managed and Next-Gen IT Services

Definition

This quadrant assesses providers that offer managed IT services to clients in the media and entertainment industry, providing them with a truly connected, intuitive and seamless journey. Many enterprises need to digitalize offline transactions and improve return on marketing investments augmented with optimized programmatic advertising. It is equally crucial to deploy next-gen solutions such as cloud, AI, ML, AR, VR, and attribution analytics and privacy across the movie studios, music, radio, podcast, social media, sports and live entertainment, OTT and direct-to-consumer, eSports, video game and television segments.

By outsourcing the network, customer and service components, media and entertainment enterprises have more scope to innovate and offer high-quality products. The providers evaluated in this quadrant manage and improve IT services estate, covering the following aspects:

- Core IT infrastructure managed services that include network services such as provisioning, orchestration, optimization, monitoring, virtualization, troubleshooting, and hardware and software maintenance
- 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 applications
- Cloud services management and content delivery network (CDN) services for content storage, high-performance computing to render visual effects, animation workflows and distribution
- Augmented services such as edge computing, AI, automation, optimization and provisioning, broadcast operations management, cybersecurity and disaster recovery, along with curating rating and recommendation engines

Eligibility Criteria

1. Offer a **combination of managed IT services**, including **infrastructure and application services** in EMEA and 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 and AI use to generate ROI**
4. Demonstrate **strategic partnerships** with hyperscalers, CDNs, data center hosting companies, alliance partners and other niche players to **scale cloud- and video-based solutions**
5. Offer **cybersecurity and privacy to mitigate infringements** and theft and protect consumer interests
6. Offer referenceable case studies that illustrate how managed IT services improve **service quality, reduce churn and increase efficiency, simplicity and CX**
7. Demonstrate **lower TCO, faster time to market, security, flexibility and scalability**



Intelligent Business Process Management (iBPM) Services

Definition

This quadrant assesses providers that offer intelligent business process management (iBPM) services to telecom, media and entertainment (TME) enterprises. The iBPM services are driven by automation and analytics and include customer services (front office and back office, B2B and B2C), sourcing and procurement, HR, finance and accounting (F&A), regulatory and compliance, knowledge services, master data management, field workforce services, network operations, operational business intelligence (customer, marketing and asset) and supply chain management. These services enable TME enterprises to improve efficiency and productivity in daily operations and business processes (front, middle and back office), enhancing CX and decision-making.

Providers often use AI-, ML- and analytics-based business process services to enhance operational efficiency, CX and revenues.

iBPM services also include audit, assurance, risk and compliance, surveillance, quality, change management, project management, transformation planning, experience design services, application support and maintenance and related areas. These improve operational efficiency and business resiliency via cloud, data, hyperautomation, analytics, and diversified delivery and captive centers.

Content royalty and rights management services, such as legal contract standardization and governance, and content lifecycle management services, such as acquisition, curation and customization, also form part of managed services for media enterprises. Other crucial support functions include 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.

Eligibility Criteria

1. Offer a combination of the following to enterprises across the value chain with expertise in the assessed region:
 - F&A
 - Sourcing, procurement and supply chain
 - Customer service
 - HR
 - Legal
 - Regulatory and compliance management
 - Media and content management
 - Master data management
 - Field workforce services
 - Network operations
 - Media analytics
 - Work order management
 - Meter data management
 - O/BSS
2. Possess **knowledge of industry and regional regulations**, including ESG
3. Have experience in **optimizing business processes** for leading firms with cybersecurity, process mining, cloud, AR, VR, AI, ML, data science, ITSM, process and standards capabilities
4. Offer the ability to leverage various storage, software and hardware vendors and provide clients with **managed and professional IT services**
5. Demonstrate **partnerships** with industry associations, regulatory bodies, technology firms, and telecom and media startups
6. **Provide referenceable case studies**



Quadrants by Region

As a part of this ISG Provider Lens™ quadrant study, we are introducing the following four quadrants for Telecom, Media and Entertainment Industry Services — 2024 study:

Quadrant	EMEA*	North America
Strategy and Enablement Services	✓	✓
Telecom Managed and Next-Gen IT Services	✓	✓
Media and Entertainment Managed and Next-Gen IT Services	✓	✓
Intelligent Business Process Management (iBPM) Services	✓	✓

*EMEA refers to the U.K., Germany, France, Spain, Italy, the Netherlands, Sweden, Switzerland, Finland, Norway, Belgium, Denmark, the Kingdom of Saudi Arabia, South Africa, Israel, Turkey, Portugal and Poland.



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

Milestones	Beginning	End
Survey Launch	July 9, 2024	
Survey Phase	July 9, 2024	August 9, 2024
Sneak Previews	October 2024	
Press Release & Publication	December 2024	

Collecting client testimonials via the Star of Excellence™ Program requires early client referrals (no official reference needed) because CX scores have a direct influence on the provider's position in the IPL quadrant and the awards.

Please refer to the [link](#) to view/download the ISG Provider Lens™ 2024 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



ISG Star of Excellence



The ISG Provider Lens 2024 – Telecom, Media and Entertainment Industry Services research study analyzes the relevant software vendors/ service providers in the global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of July 2024, 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 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



Iain
Fisher

Director



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*

ADP

Agilisium*

Amdocs

Anaplan

Arcxp

Aria Systems

Ascendion

Atento

Atos*

AudioCodes

Bain & company

Baringa

BDO

BearingPoint

BeyondNow

Beyondsoft Consulting*

Birlasoft

Brilliant Noise

Brillio*

Capgemini*

Ceragon Networks

CGI*

CI&T*

Cognizant*

Concentrix*

Conduent*

CSG

Cybage

Cyient

Deloitte

DXC*

Encora

Endava

EPAM*

Eraneos

Ericsson

Eviden*

Exela Technologies

EXL*

EY

Firstsource*

Forvis Mazars

Foundever

FPT

FTI Consulting

Fujitsu

Futurism technologies

Genpact*

Globant*

Harman DTS*

Harmonic

HCLTech*

HGS*

Hitachi Digital Services*

IBM*

Infinite Tech

Infosys*

Intellias

Intexsoft



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* Rated in previous iteration

KPMG	PwC	Thoughtworks
Kyndryl*	Qvest	Tietoenvy
Lifecycle Software	Rolandberger	To the New*
LTI Mindtree*	Slalom	Transcom
McKinsey	Softtek	T-systems
MediaLink	Sopra Steria	TTEC
Mphasis	Sutherland*	Virtusa*
NEC	TaskUs	VVDN
Nokia	Tata Communications*	Wit S.p.A.
NTT Data	Tata Elxsi*	Wiley Rein LLP
Oracle	TCS*	Wipro*
Orion Innovation	Tech Mahindra*	WNS*
PDGC	Tecnotree	Xavient
Perficient*	Teleperformance*	Zensar
Persistent*	Telus International	



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™

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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

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Founded in 2006, and based in Stamford, Conn., ISG employs 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, 2024

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