iSG Provider Lens™

2022

Media and Communication Services 2022

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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 800 clients, including 75 of the top 100 enterprises in the world, 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; technology strategy and operations design; change management; market intelligence and technology research and analysis. Founded in 2006 and based in Stamford, Connecticut, ISG employs more than 1,300 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.

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Introduction

The media and communication verticals are subject to a high rate of change, and providers catering to these verticals face a high degree of customer churn if they fail to adapt to their customer's requirements.

Communications is an essential service, and it forms the backbone of many industries. This became more evident during the pandemic, when people who worked from home relied on robust communication services more than ever. Although the demand for network services increased during this period, network operators were unable to scale their resources in a cost-efficient manner to meet the unprecedented demand for adequate network bandwidth.

To reduce customer turnover, network operators are striving to offer better services to their customers without significantly increasing costs. They are, for instance, ramping up investments in the development and deployment of 5G services, which not only offer network services that are significantly faster but also open newer models of revenue.

In the media space, the over-the-top (OTT) ecosystem has posed a significant challenge to legacy media companies, because they are unable to innovate at the same pace. The OTT market is, however, becoming crowded, with many legacy media companies also joining the digital bandwagon. The key factor to success for media companies now lies in their ability to offer their customers with the best content without a significant surge in pricing.

A key challenge faced across industries is the requirement to re-engineer the underlying networks to better optimize their performance against a greater network load. Enterprises seek service providers that can provide IT outsourcing services, which address the challenges posed by the legacy network infrastructure and help alleviate network upgrade issues.

Key services such as network provisioning; orchestration and automation; cloud migration and automation; and application management, including API integration and workflow automation, will be in demand in the future, as media and communication service providers build an infrastructure that is seamlessly connected and improves the degree of innovation.

Besides improving the IT environment, media and communication companies are also outsourcing business processes that are repetitive or can be automated, allowing them to embrace change and increase the focus on core areas of innovation.

Providers in the communication space are more likely to outsource customer-centric operations such as customer engagement, billing and invoicing, and data monetization services, which help with upselling and cross-selling. On the other hand, providers in the media industry offer content lifecycle management operations, which include acquisition, production and distribution, in addition to customer-centric operations. They also offer services that can automate clients' royalty and rights management processes, further reducing revenue leakage.

This ISG Provider Lens™ study examines a comprehensive range of services in the media and communication verticals, focusing on service provider capabilities, their go-to-market strategies and differentiators.

Specific takeaways for IT decision-makers include:

- A differentiated positioning of service providers based on competitive strengths and portfolio attractiveness

- A perspective on the U.S. market

By providing critical decision-making insights into provider positioning and key relationships, the analysis helps ISG advisors and enterprise clients evaluate current vendor relationships and potential engagements.

Quadrants Research

As a part of this ISG Provider Lens™ quadrant study, we introduce the following four quadrants under Media and Communication Services - 2022:

Simplified Illustration

MEDIA AND COMMUNICATION SERVICES – 2022			
MEDIA		COMMUNICATIONS	
Media Business Services	Media Next-gen IT Services	Communications Business Services	Communications Next-gen IT Services

Source: ISG 2022

The 2022 study includes new quadrants that reflect the latest developments in the media and communications market and their technology trends. The media and communication services study consists of the following four quadrants: media business services, media next-gen IT services, communications business services and communications next-gen IT services.

Media Business Services

This quadrant assesses service providers that offer business process outsourcing (BPO) services to clients from the media industry. Providers in this quadrant are responsible for managing clients' business operations across the value chain. Key services that ISG has deemed essential for service providers to extend to its clients include backend customer services such as account management, billing and invoicing, order processing and service management; frontend customer services such as call center, chatbots, dynamic FAQ and relationship management; sales and marketing services such as advertising inventory management, analytics and reporting, click through behavior and sales automation; royalty and rights management services such as contract standardization and governance; and content lifecycle management services such as acquisition and customization.

Eligibility criteria:

- Ability to offer a combination of services, which include different backend and frontend customer services, sales and marketing, royalty and rights management, and content lifecycle management

- Dedicated FTEs that are technically trained or certified in areas such as cybersecurity, process mining, AI, machine learning and data sciences; legal expertise is also preferred

- Demonstrate AI, analytics and blockchain integration capabilities with business processes across the media industry

- Ability to leverage ERP and CRM tooling vendors and provide services to clients

- Offer referenceable case studies for various services across the value chain

Media Next-Gen IT Services

This quadrant assesses service providers that offer IT outsourcing services to clients from the media industry. Providers evaluated in this quadrant are responsible for managing and improving the performance of their media enterprises' network infrastructure. By outsourcing the network and its associated functions, media companies have more scope to innovate and offer high-quality products. 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; edge computing services; application development and management services such as agile, AIOps, cognitive, DevOps/CI/CD, microservices and robotic process automation; and cloud enablement services.

Eligibility criteria:

- Ability to offer a combination of IT outsourcing services, which include CDN and edge computing, application management and cloud enablement

- Extensive domain expertise in areas such as SDN, MFV/NFV, SD-WAN and others

- Demonstrate strategic partnerships with hyperscalers such as AWS, Google Cloud, Microsoft Azure and others to help clients implement the cloud

- Ability to offer cybersecurity services such as antivirus solutions, IAM and endpoint security to mitigate data theft

- Ability to offer referenceable case studies that illustrate how IT outsourcing services improved the service quality and customer experience

Communications Business Services

This quadrant assesses providers that offer BPO services to clients from the communication industry and are keen on outsourcing their operations from the backend to the frontend of their businesses. Incorporated with AI, machine learning and analytics, BPO services are used by communication service providers to not only enhance the operational efficiency, but also derive customer-centric data that is used to enhance customer experience or improve 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, dynamic FAQ and chat bots.

Eligibility criteria:

- Ability to offer a combination of services used for customer-centric functions such as order processing, account management, service management, billing/invoicing, call center, dynamic FAQ, chatbot technology and relationship management

- Dedicated FTEs who are trained/certified in areas such as cybersecurity, process mining, AI, machine learning and data sciences

- Demonstrate AI and analytics capabilities and integration with business processes specific to the communications industry

- Ability to provide ERP and CRM tools to clients from the communications industry

- Ability to offer referenceable case studies for business services across the communications industry

Communications Next-Gen IT Services

This quadrant assesses service providers that offer IT outsourcing services to clients from the communication industry. Providers evaluated in this quadrant are responsible for managing the critical network infrastructure and applications, thereby improving the quality of services and customer experience. Key services that ISG has deemed essential for service providers to extend to their clients include network services such as provisioning, orchestration and optimization; application development and management services such as agile, AIOps, API integration, cognitive, DevOps/CI/CD, microservices and robotic process automation; cloud enablement services, including migration to the telco cloud; and OSS/BSS managed services that include fault management, inventory management, change management, performance management and vendor management.

Eligibility criteria:

- Ability to offer a combination of IT outsourcing services such as network management, application management, OSS/BSS support, and cloud management to clients from the communication industry

- Demonstrate extensive expertise in areas such as 5G services, SDN, NFV, vRAN and SD-RAN Demonstrate strategic partnerships with hyperscalers such as AWS, Google Cloud and Microsoft Azure to help clients implement the telco cloud

- Demonstrate partnerships and integration capabilities with telco OEMs such as Aviat, Cisco, Ericsson and Huawei

- Ability to offer cybersecurity services such antivirus solutions, IAM and endpoint security to mitigate data theft

- Ability to provide referenceable use cases that illustrate how IT outsourcing services improved the service quality and customer experience

Quadrants by Region

Quadrants	Global	U.S.
Media Business Services	Overview	✓
Media Next-gen IT Services	Overview	✓
Communications Business Services	Overview	✓
Communications Next-gen IT Services	Overview	✓

Schedule

The research phase falls in the period between **June and August 2022**, during which survey evaluation, analysis and validation will take place. The results will be presented to the media in **November 2022**.

Milestones	Beginning	End
Launch	June 9, 2022	
Survey Phase	June 9, 2022	July 7, 2022
Sneak Preview	September 12, 2022	September 23, 2022
Press Release	November End 2022	

Please refer to the link to view/download the ISG Provider Lens™ 2022 research agenda.

Access to Online Portal

You can view/download the questionnaire at the ISG website, 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 work identified by the 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 to 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 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.
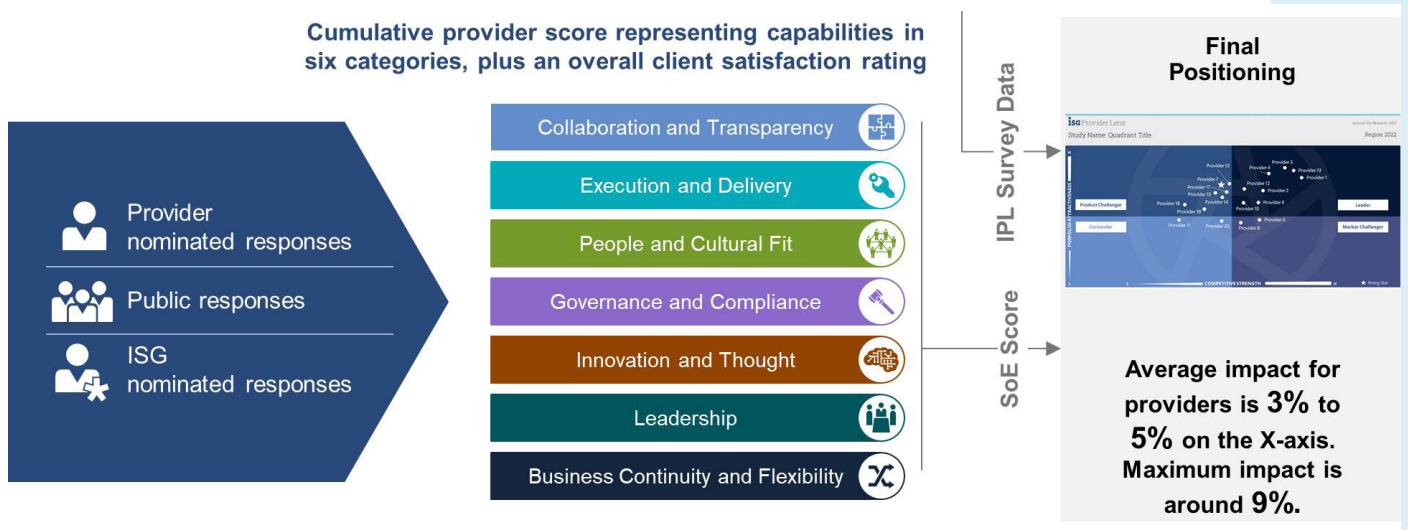
Providers are invited to nominate their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

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.

Direct any questions or provide comments to star@isg-one.com. This email will be checked daily; please allow up to 24 hours for a reply.

Partial list of companies being invited for the survey

Are you in the list or do you see your company as relevant provider that is missing in the list? Then feel free to contact us to ensure your active participation in the research phase.

Accenture	Cyient	Mindtree
Atos	DXC Technology	NTT DATA
Axians	Genpact	Persistent
Birlasoft	HCL	Publicis Sapient
Capgemini	Hexaware	Rackspace Technology
CGI	HGS	TCS
Coforge	Infosys	Tech Mahindra
Cognizant	ITC Infotech	Verint Systems
Concentrix	Kyndryl	Virtusa
CSG	LTI	Wipro
CSS Corp	Lumen	WNS

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ISG Provider Lens QCRT Program Description

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 providers inclusion, participate in briefing calls,

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

The ISG Provider Lens QCRT program helps round out the research process, supporting comprehensive research-focused studies.

Quality & Consistency Review Team for this study

Jeff Cosby
Partner, Media, Technology and
Software Services

Do you need any further information?

If you have any questions, please do not hesitate to contact us at isglens@isg-one.com.