ISG Provider Lens®

Media and Entertainment—Managed and Next-gen IT Services

Navigating the digital nexus with AI, cloud, edge and 5G as catalysts for transformation and growth

Customized report courtesy of: Atos

QUADRANT REPORT | DECEMBER 2025 | EMEA

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Report Author: Yash Jethani

EMEA M&E landscape shifts to cloud-native AI-led supply chains to cut time-to-air and drive monetization

Purpose and context of the report

This report evaluates the evolving media & entertainment (M&E) ecosystem in EMEA, highlighting how enterprises and service providers are leveraging AI (analytics, GenAI and agentic AI), cloud and automation to transform the content supply chain, audience engagement and platform monetization models. It evaluates providers across managed IT services and strategy enablement categories, focusing on innovation, operational agility and value realization.

Market overview and trends outlook

The EMEA M&E industry is at a pivotal juncture, transitioning from legacy broadcast models to cloud-native, data-driven and AI-automated ecosystems. Demand for localization, remote production, free ad-supported streaming TV (FAST) channels and hybrid OTT platforms is accelerating. Providers are aligning modernization road maps to AI-assisted workflows, open APIs and real-time analytics to reduce time-to-air, optimize cost and deliver consistent, high-quality viewing experiences across devices and regions. The EMEA landscape includes global consulting leaders, digital engineering firms, media technology specialists and cloud-native platform vendors.

Top industry and market trends: opportunities for providers

- Convergence of AI, automation, cloud, edge and 5G is the foundation for M&E production, distribution and enterprise transformation. ML and GenAI drive QC, auto-versioning, subtitling and metadata enrichment. Analytics and performance insights are now central to content commissioning, ad yield optimization and audience targeting. As per ISG's latest GenAI survey across industries, 47 percent of M&E organizations expect to increase their GenAI spending by 20-30 percent in 2025, in contrast to 23 percent of enterprises overall. Sixty percent of M&E enterprises reported audio/visual content

AI, cloud and automation redefine the EMEA M&E landscape — faster launches, lower cost and better CX.

generation as their top use case, followed by customer services and customer insights. While cost savings and operational efficiency remain top priorities, most GenAI initiatives in M&E are being pursued to drive innovation and business growth.

- These patterns are in line with ISG's GenAI survey findings. Data management and AI governance support remain top roles that M&E enterprises demand from service providers. Nearly 44 percent of M&E enterprises report insufficient in-house capabilities when selecting an MSP for AI initiatives, compared with 31 percent of enterprises overall.
- AI-led monetization through personalized content, contextual ads, D2C optimization and rights management modernization are clear opportunities for providers in this space.

- Demand for platform-led operations, replacing siloed IT/creative stacks with API-first, microservices-driven models, continues to grow. As per ISG's cloud survey in 2024, for 29 percent of M&E enterprises, cloud service performance remains a top priority for cloud services deployment. However, organizational readiness and TCO for provisioning remain the top challenges for enterprises. Supply chain management, e-commerce, ERP and procurement functions remain top users of cloud adoptions within M&E enterprises. Over the next two years, content management systems are expected to be the top priority for cloud adoption.
    - Growth in cloud-native streaming, distributed editing, remote collaboration and workflow automation remains the key opportunity for providers in this space.
- Rapid adoption of metadata enrichment, media asset management (MAM) and digital asset management (DAM) modernization, real-time analytics and AIOps-enabled content workflows for agility and scale is also clearly visible. With connected collaboration, distributed creative and operational teams are increasingly adopting cloud-based collaboration and orchestration tools. As more M&E enterprises leverage cloud solutions, their usage of existing cloud-based AI modules and applications will also rise, along with expanding existing cloud contracts with GPU provision for AI use cases. To support this shift, enterprises will also require private cloud/on-premises provisioning for training LLMs.
    - IT service providers have substantial opportunities in helping M&E enterprises modernize their infrastructure through cloud migration, GPU-provisioned AI infrastructure and hybrid architectures that support both collaborative workflows and private LLM training. Additional value lies in integration services that connect disparate collaboration tools, the implementation of AIOps solutions for content workflows and managed services that optimize complex multicloud environments while controlling costs around expensive AI compute resources.
- Strategic advisory is increasingly tied to operating model redesign, product simplification, policy/regulatory strategy, AI governance and ESG frameworks.
    - Hence, there is strong demand for strategic program management office (PMO), regulatory orchestration, talent/ESG planning and M&A-driven operating model change, and providers must tap into this play.

However, challenges persist across fragmented legacy architectures and duplicated editorial/technology workflows, compounded by complex multiregion compliance needs (for example, GDPR, IP protection, sovereign cloud). There is also limited interoperability across legacy MAM, content management systems (CMS), content delivery networks (CDN) and adtech systems. Skills gaps in AI, cloud engineering and data governance continue to mar progress. Challenges include overlapping tool ecosystems (MAM/DAM), manual compliance processes, high integration costs for legacy systems and operational bottlenecks in cross-border rights management.

However, AI- and automation-led content supply chain transformation has delivered 30-50 percent faster delivery cycles via orchestration and automation tools, 20-35 percent operational cost reduction from cloud-native elasticity and tool consolidation, and 2-3x faster time-to-market for OTT and FAST channel launches.

Data-driven outcomes and KPIs include cycle-time reduction per content asset, error-rate reduction through automated QC, rights and ad-revenue uplift per distribution channel, as well as viewership consistency and latency performance metrics for continually improving CX.

Vertical-specific insights and recommendations

EMEA shows strong investment in broadcast modernization, FAST channel deployment and hybrid media supply chains. AI-assisted translation, edge-enabled streaming and metadata automation are becoming baseline capabilities. Providers offering open, interoperable architectures are best positioned, as enterprises move away from proprietary broadcast systems.

An EMEA-based provider offers broadcast modernization across European media networks, enabling 40 percent faster playout readiness. A tier 1 provider with EMEA headquarters accelerates multiplatform content delivery for a pan-European OTT provider using GenAI-based workflow orchestration. A tier 1 Indian SI deployed an AI foundry for a broadcaster to automate transcoding, reducing manual operations by 45 percent. A global media-focused SI partnered with a U.S.-based, global streaming platform to modernize its content discovery and personalization engine and achieved a 22 percent increase in user engagement and an 18 percent reduction in content abandonment rates through context-aware recommendation algorithms and real-time performance analytics. Finally, an Indian SI enabled a global broadcast leader to deploy a fully cloud-integrated playout and remote production workflow, delivering 40 percent faster content turnaround through its video engineering and quality of experience (QoE) automation capabilities.

With quick wins within 12 months, M&E enterprises should prioritize Interoperable Master Format (IMF)/Extensible Metadata Platform (XMP) interoperability, invest in AI-based rights intelligence and expand hyperscaler partnerships for rapid FAST enablement.

Between 2025 and 2027, the industry will shift toward autonomous, event-driven supply chains, embedding agentic AI to automate decisioning across ingest, QC and publishing. Hence, enterprises should build multitenant, cross-platform architectures to enable content federation and real-time analytics.

Future readiness depends on AI-led, multitenant, cloud-enabled M&E systems. Providers should frame their strategy with clear what-if scenarios to target rapid transformation, for example:

- What if AI replaces 50 percent of manual QC? *Potential outcome: 45-60 percent cycle-time reduction*
- What if multitenant orchestration is fully deployed? *Potential outcome: up to 30 percent reduction in cost-to-serve*
- What if legacy broadcast systems are fully cloudified? *Potential outcome: uptime improvement to 99.9 percent with elastic scaling*

It remains to be seen how the integration of GenAI for metadata reasoning and adaptive content creation will evolve alongside the rise of intelligent MAM/DAM systems and their intersection with adtech and social commerce. By 2026, ESG and carbon-aware production are expected to become mandatory reporting metrics.

Strategic alignment to CXO priorities (enterprise buyer side)

Transformation aligns to C-suite imperatives around growth, cost, CX and risk. Cloud-based automation and AI-led insights enable faster time-to-market, reduced operational costs, superior audience engagement, and enhanced compliance and rights governance. Accordingly, the alignment with enterprise transformation agendas will include modernization of the M&E supply chain that supports broader digital transformation — converging content, commerce and connectivity to deliver immersive, personalized experiences, while ensuring operational resilience and profitability.

Conclusion and call to action

The EMEA M&E ecosystem is undergoing an accelerated shift toward cloud-native, AI-empowered operations. Providers that combine automation, open standards and cross-platform integration are leading in efficiency and monetization. To capture new growth, enterprises should partner with providers offering measurable outcomes — reduced time-to-air, improved asset ROI and enhanced compliance visibility.

ISG recommends that M&E enterprises engage in custom benchmarking and transformation road maps to align technology investments with operational and revenue growth objectives across the evolving EMEA M&E landscape.

The EMEA M&E market is pivoting from legacy broadcast to cloud-native, AI-automated ecosystems. Providers are scaling localization, remote production for FAST channels and hybrid OTT, aligning to open APIs and real-time analytics to cut time-to-air, reduce TCO and elevate CX. AI-led supply chains deliver 30-50 percent faster cycles, with cost reduction and faster launches, while ESG and sovereignty guardrails ensure compliant and resilient growth.

Provider Positioning

	Strategy and Enablement Services	Media and Entertainment - Managed and Next-gen IT Services
Accenture	Leader	Leader
Amdocs	Not In	Leader
Arthur D Little	Product Challenger	Not In
Arvato Systems	Not In	Market Challenger
Atos	Rising Star ★	Leader
Bain & Company	Product Challenger	Not In
BCG	Product Challenger	Not In
BDO	Market Challenger	Not In
BearingPoint	Product Challenger	Not In
Capgemini	Leader	Leader

Provider Positioning

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	Strategy and Enablement Services	Media and Entertainment - Managed and Next-gen IT Services
CGI	Not In	Contender
Cognizant	Product Challenger	Product Challenger
Deloitte	Leader	Not In
DXC Technology	Contender	Contender
EPAM Systems	Contender	Leader
EY	Leader	Not In
Forvis Mazars	Contender	Not In
FTI Consulting	Product Challenger	Not In
Globant	Contender	Product Challenger
Grant Thornton	Contender	Not In

Provider Positioning

	Strategy and Enablement Services	Media and Entertainment - Managed and Next-gen IT Services
HCLTech	Leader	Leader
IBM	Leader	Leader
Infosys	Leader	Leader
Kearney	Product Challenger	Not In
Kyndryl	Not In	Product Challenger
LTIMindtree	Not In	Product Challenger
LTTS	Not In	Product Challenger
McKinsey & Company	Leader	Not In
Omnicom Group	Not In	Market Challenger
PCCW Global	Not In	Market Challenger

Provider Positioning

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	Strategy and Enablement Services	Media and Entertainment - Managed and Next-gen IT Services
Persistent Systems	Not In	Contender
Prodapt	Contender	Not In
Publicis Groupe	Market Challenger	Not In
PwC	Leader	Not In
R/GA	Not In	Market Challenger
Simon Kucher	Contender	Not In
Sopra Steria	Contender	Not In
Tata Communications	Not In	Contender
Tata Elxsi	Not In	Product Challenger
TCS	Product Challenger	Leader

Provider Positioning

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	Strategy and Enablement Services	Media and Entertainment - Managed and Next-gen IT Services
Tech Mahindra	Leader	Product Challenger
ThoughtWorks	Not In	Product Challenger
Tietoevry	Not In	Contender
Virtusa	Not In	Rising Star ★
Wipro	Product Challenger	Leader
Zensar Technologies	Not In	Contender

A study evaluating IT service and solution providers transforming TME enterprises through **AI, automation and platformization.**

Strategy and Enablement Services

Media and Entertainment — Managed and Next-gen IT Services

Simplified Illustration Source: ISG 2025

Definition

This quadrant assesses providers offering managed and advanced IT, cloud and engineering services to media and entertainment (M&E) enterprises, including broadcasters, OTT platforms, sports brands, content distributors and publishers. These providers manage high-volume data ingestion pipelines, deliver resilient and scalable backend infrastructures, and orchestrate personalized experiences using real-time analytics, cloud, content delivery networks (CDN) and AI. The providers offer solutions such as digital asset management, AIOps-enabled content lifecycle acceleration, metadata enrichment, anti-piracy services and multiscreen UX engineering. They integrate GenAI for applications such as editorial planning, asset generation (alternative cuts, voiceovers and descriptions), A/B testing and fan journey mapping. Providers also offer edge-aware content delivery, AI-led ad optimization and gamified loyalty programs to improve monetization. Offerings integrate creative and IT functions via microservices, APIs and containers. Services support immersive formats, real-time overlays (for example, sports stats and voting), and hyperpersonalized advertising.

Scope of the Report

This ISG Provider Lens® quadrant report covers the following two quadrants for services/solutions: Strategy & Enablement Services and Media and Entertainment — Managed and Next-gen IT Services

This ISG Provider Lens® study offers IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants) based on their competitive strengths and portfolio attractiveness
- Focus on the regional market

Our study serves as the basis for important decision-making by covering providers' positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

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. 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).

Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios 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 in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: 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 meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

Strategy and Enablement Services

This report is valuable for providers offering **strategy and enablement services** in EMEA to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG evaluates the current positioning and relative strengths of service providers in EMEA, offering strategy and consulting services to telecom, media and entertainment (TME) organizations, encompassing digital transformation, including the adoption of GenAI, M&A, restructuring and business strategy.

C-suite executives

should read this report to understand innovations in AI, ESG, principles, data privacy and security. This knowledge is essential for enhancing sales pitches and developing more effective client engagement strategies. Understanding these innovations will strengthen their competitive advantage and foster trust and transparency in an increasingly discerning market landscape.

Strategy professionals

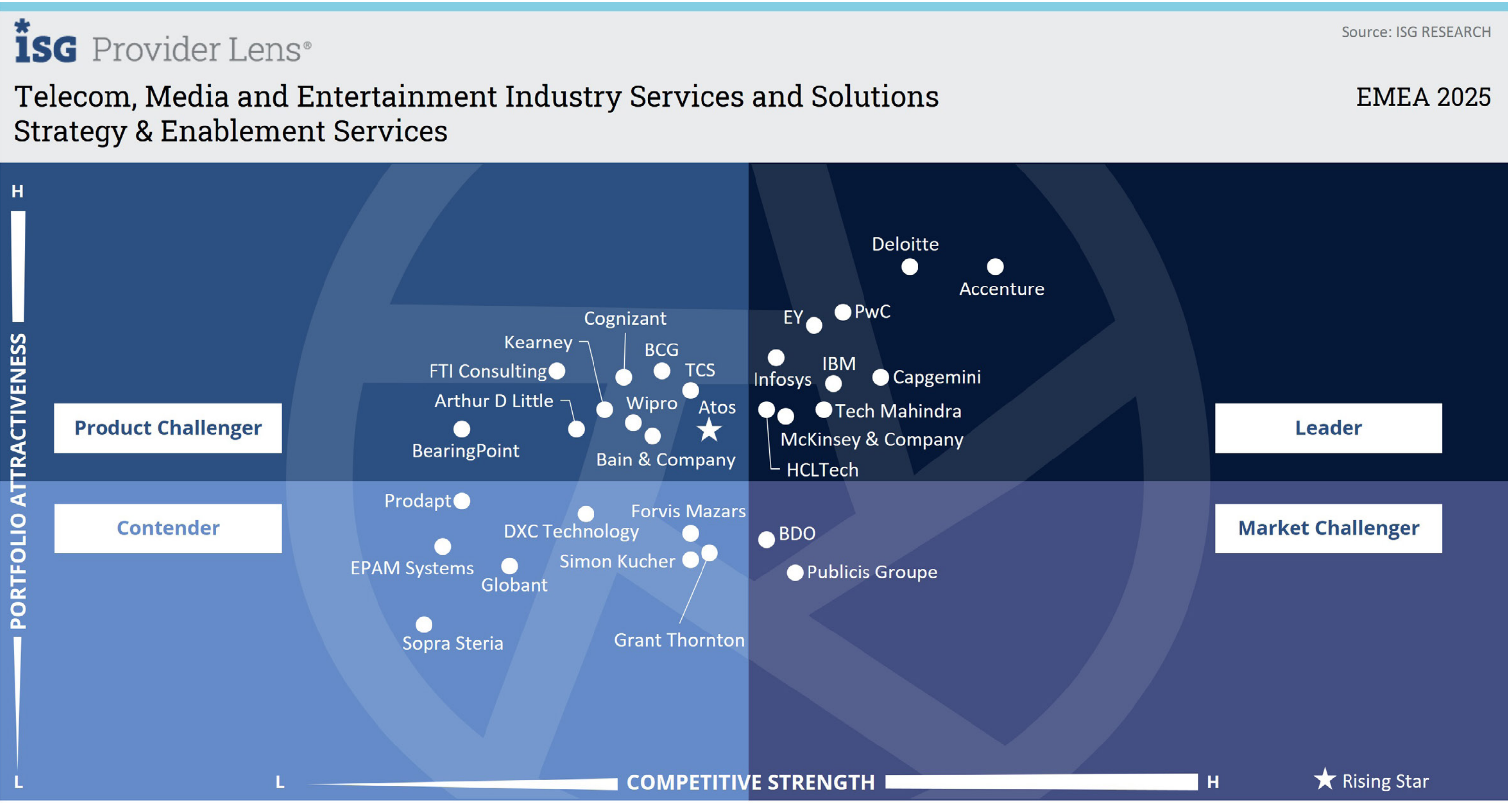
should read this insightful report to comprehend how the adoption of digital solutions for modernization can enhance their ability to identify emerging market opportunities. Leveraging these innovative technologies, professionals can facilitate transformative change within their organizations and navigate the complexities of today's dynamic business environment.

Consultants and industry analysts

should read this report to understand the evolving landscape, provide informed advice to clients and effectively support their strategic planning initiatives. This report provides professionals with the knowledge needed to support their clients' strategic planning, helping them navigate challenges and seize new opportunities. This insight will enhance their credibility and effectiveness, positioning them as trusted advisors in a complex business environment.

Procurement and product development professionals

should read this report to enhance vendor management, leverage strategic consulting insights and drive cost efficiencies in sourcing, contract negotiation and technological advancements. Understanding these elements enables professionals to optimize operations, enhance supplier relationships and implement innovative solutions for organizational success.



This quadrant assesses M&E **strategy and enablement providers** that deliver **AI- and GenAIled** ingestion, scalable backend platforms and enhanced CX, while guiding **governance, monetization** and **ESG.**

Yash Jethani

Definition

This quadrant evaluates providers offering strategic advice and enablement services to telcos, focusing on transformation, M&A and business strategies, from procurement to sales. They leverage AI and automation to design effective governance frameworks, simplify product portfolios and consolidate core business functions, ensuring network superiority, data-centricity, operational simplicity and cost optimization.

In the media sector, AI-led insights are used to strategize content, attract advertisers and consumers, and optimize VOD models for ad growth via direct-to-consumer approaches. This involves automating rights management, monetizing experiences and enhancing subscriber loyalty through modernization.

Providers integrate digital technologies such as GenAI, agentic AI, IoT, 5G, edge computing, AR/VR, automation, cybersecurity, blockchain, data analytics, Industry 4.0 and cloud computing into their service offerings. Additional support includes coinnovation, taxation, talent management and ESG, offering end-to-end assistance with managed or on-demand options.

Eligibility Criteria

1. Deliver **strategic advisory services** to enterprises of all sizes, backed by a proven track record, domain expertise, TME blueprints and transformation frameworks — often supported by a strategic PMO
2. Provide differentiated, technology-led guidance in areas, including **AI, 5G, ORAN and cloud, linking digital solutions to business outcomes** such as growth, monetization and efficiency, often via coinnovation hubs or testbeds or redesigning
3. Offer structured **services in policy, regulation and standardization,** demonstrating impact across regional markets in EMEA
4. Support transformation with **advanced tools and advisory services** in **R&D, ESG, taxation, GCC operations and talent management** to enable future-ready operating models or phased blueprints
5. Re/design and scale transformation programs that **deliver measurable ROI, supported by AIOps, GRC and change management**
6. Maintain transparent fee structures and offer flexible **engagement models,** including data governance ESG, security and confidentiality clauses
7. Demonstrate alignment with various stakeholders for **revenue-sharing models, etc. through case studies**
8. Publish and influence **industry perspectives on TME strategy,** AI adoption and monetization trends via events, whitepapers or forums

Observations

Differentiated strengths center on endtoend telecommedia enablement that integrates 5G, cloud, AI and ESG into connected industry frameworks. Providers deliver outcomefocused strategy-to-execution (stratecution), blending consulting, design and engineering to advance content pipelines, agentic AI and API monetization, while building panregional digital cores on sovereign cloud. They reinforce responsible AI and AI factories, guide M&A integration and operating model harmonization and apply policysmart orchestration with GDPR/NIS2, uniting content with broadcast, securityasaservice and KPI-based delivery.

Common strengths include AI native operations, standardized digital cores and open network integration aligned to industry standards. Providers prioritize sovereign cloud compliance and GDPR/EU AI Act guardrails, monetizing APIs, network slices and content rights alongside ESG aligned transformation. Methods embed benefit tracking, federated data, privacybydesign and continuous model auditing, while hyperscaler coinnovation and labs accelerate digital twins and media workflow automation to drive crossborder reuse and faster time-to-market.

Common cautions reflect regulatory fragmentation and multicountry harmonization that can slow execution. Success depends on client governance maturity, data quality and residency, with gaps noted in integration flows, middleware and custom development, and risks of delivery fragmentation across business units. Ecosystem heavy models may challenge midtier buyers; local regulatory processes can extend timelines; AI factories require data curation; and sovereign/cyber demands can increase the TCO without phased rollout, mandating disciplined change management and a balanced approach to speed with compliance.

From the 53 companies assessed for this study, 30 qualified for this quadrant, with 10 being Leaders and one Rising Star.

Accenture is a strategic leader in telecom-media enablement across EMEA, integrating 5G, cloud, AI, ESG and security consulting. Its connected-industry and GenAI frameworks help carriers and studios coinnovate sustainable, data-centric business models.

Capgemini's EMEA strategy and enablement practice integrates consulting, design and engineering to drive AI, Open RAN and sustainability programs for telecom and media clients under evolving EU frameworks.

Deloitte enables pan-regional telecom and media transformation through standardized digital cores, AI-native operations, sovereign cloud compliance and ecosystem monetization, driving cost efficiency, speed and sustainable growth.

EY-Parthenon drives strategic enablement in the EMEA M&E market through responsible AI, ESG, and open network advisory, aligning compliance, innovation and platform growth for sustainable digital transformation.

HCLTech drives AI-first, sustainable transformation for EMEA telecom and media enterprises through responsible AI, ESG governance and open network strategy, helping clients achieve compliant, data-driven growth across 5G, cloud and digital ecosystems.

IBM shapes EMEA's M&E enablement through watsonx-powered AI factories, open network integration and ethical AI governance, aligning innovation with compliance and customer trust.

Infosys

Infosys' consulting practice enables AI-driven strategy, M&A integration and ESG-aligned growth for EMEA telecom and media enterprises through Topaz™ AI and Cobalt™ Cloud frameworks.

McKinsey & Company

McKinsey & Company enables EMEA-based telcos to optimize capital allocation, standardize cross-market operations and scale AI/cloud transformation under regulatory and ESG frameworks, unlocking valuation, compliance and efficiency gains. It has strong strategic depth and CEO-level influence.

pwc

PwC helps telecom operators scale regulatory compliance, simplify cross-border operations, and unlock M&A and AI-driven innovation, while aligning ESG and public-private strategies across EMEA.

TECH mahindra

Tech Mahindra delivers strategy and enablement services that convert pan-regional ambition into compliant, localized growth and repeatable value creation.

Atos

Atos Group (Rising Star) is an AI-powered TMT partner in EMEA, uniting telecom modernization (BSS/OSS, network on cloud) with media operations (BNCS, IP broadcast), data monetization and security as a service, prioritizing sovereignty and KPI-based delivery.

Atos Group

Rising Star

"Atos Group enables open-API ecosystems with tools for data, microservices and billing, supporting new enterprise services, such as IoT and payments, without disrupting legacy IT. In EMEA, its leadership blends IPs with sovereign cloud, cybersecurity and GenAI."

Yash Jethani

Overview

Atos Group is headquartered in Bezons, France. It has more than 70,000 employees across 67 countries, operating under two brands — Atos for services and Eviden for products. In FY24, the company generated €9.6 billion in revenue, with Tech Foundations as its largest segment. Atos Group offers world-class delivery capabilities via Global Delivery Centers in 11 countries, providing innovative, customized and hands-on solutions. It combines sovereign cloud, AI, GenAI and network modernization with media operations (BNCS and IP broadcast) to help providers transition from connectivity to platform-led, secure growth. Atos pairs vertical IP to deliver KPI-led reinvention under EU sovereignty.

Strengths

Vertical TME portfolio with sovereign posture: Atos' EMEA strategy combines vertical TMT offers (BSS, OSS MANO, Telco Ops, B2B Cloud, Network Services and Media Ops) with horizontal practices (Cloud, Cybersecurity, Data and AI). This modular design supports sovereignty and compliance for carriers and broadcasters, backed by KPI-driven delivery and over 290 TMT clients. Atos offers security as a service (17 SOCs), IAM/PKI/encryption and PCI programs for tier 1 CSPs. Its DevSecOps and compliance tools support sovereign cloud, AI and content protection mandates.

Scalable BSS/OSS modernization: Atos' projects in Germany and France deliver 20–30 percent OpEx savings and 35-40 percent fewer assurance tickets via open source analytics and automation platforms. The company's OSS MANO stack supports inventory, provisioning, assurance and orchestration aligned with TM Forum autonomy levels.

Media operations anchored by BNCS and IP broadcast: BNCS manages multivendor media estates for WBD, BBC, Sky and Bloomberg. Atos designs SMPTE-2110 IP networks and executes complex migrations (Globecast) while maintaining broadcast continuity, vital for EMEA media players.

GenAI accelerators for measurable impact: Atos' Polaris AI Platform and GenAI tools such as Kore.ai, QE Assist, Persona360 and IDP/NLP enhance customer operations, engineering, automation and marketing, driving faster time-to-market and quality gains.

Caution

Portfolio breadth can feel complex for midtier EMEA operators/broadcasters; benefits rely on CI/CD adoption, data governance and strong change management. Premium sovereign/cyber requirements may elevate TCO without a phased rollout for Atos Group.

Media and Entertainment — Managed and Next-gen IT Services

This report is valuable for providers offering **media and entertainment managed and next-gen IT services** in EMEA to understand their market position and for enterprises looking to evaluate these providers. The report also highlights the changing market dynamics of these services that involve managing and improving the performance of the network infrastructure and CX of media enterprises.

Technology leaders and line of business (LOB) heads

should read this report to assess the capabilities of modernization and monetization services, including managed and next-gen IT services. The report also provides insights into the market advancements that are shaping media cloud strategies. Leveraging the findings presented, organizations can better navigate the evolving landscape and drive their digital transformation initiatives forward effectively.

Enterprise CIOs

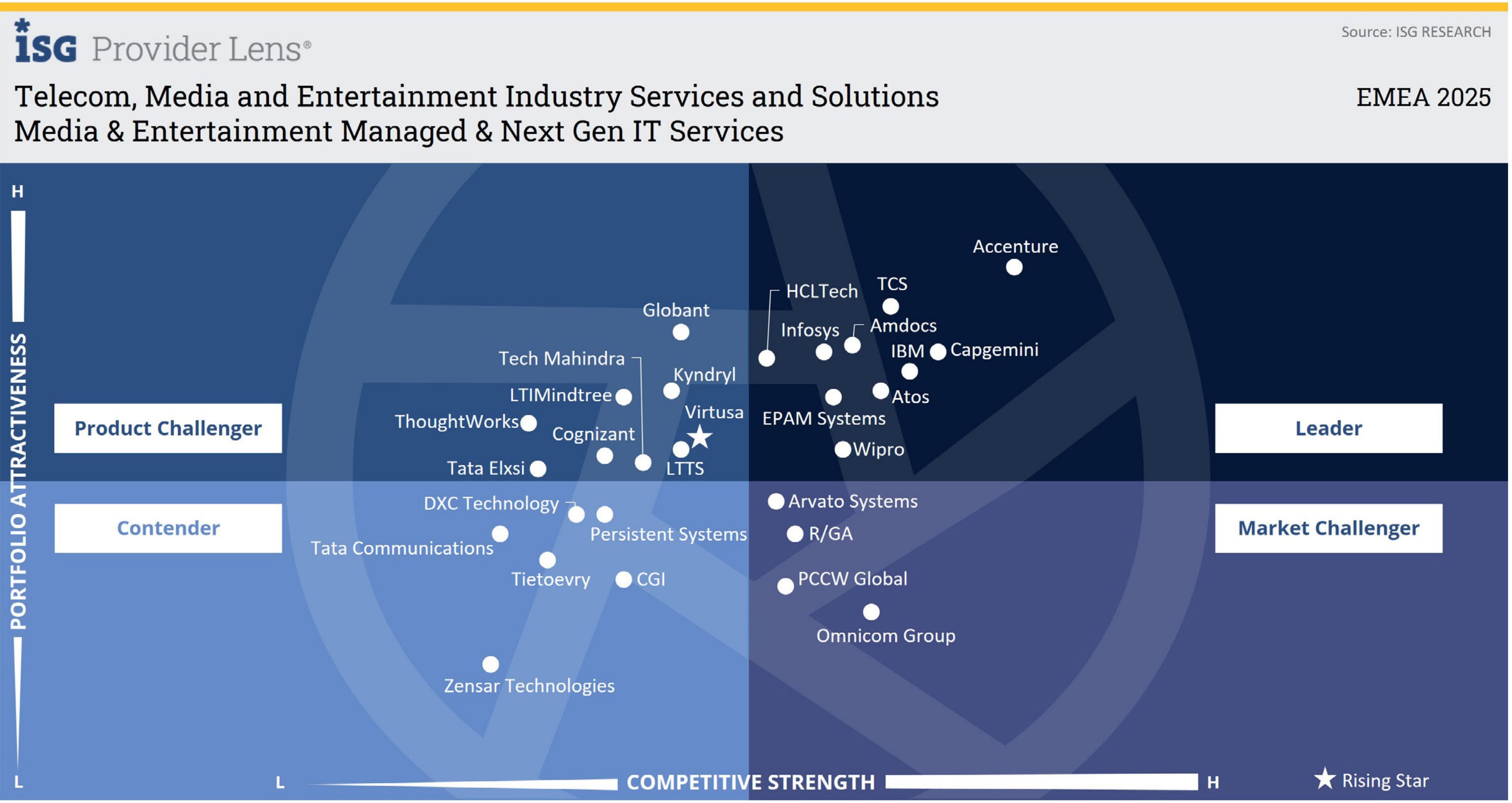
should read this report to understand how providers help enterprises manage performance, security and scalability while optimizing their IT/network infrastructure. The report delves into best practices and innovative strategies that can empower organizations to achieve operational excellence and maintain a competitive edge in the ever-evolving digital landscape, making it an essential resource for informed decision-making.

Strategy professionals

should read this report to understand how service providers help enterprises shape their IT strategy goals and support decision-making on partnerships and cost-reduction initiatives. The report provides valuable insights into industry trends and best practices that can enable organizations to align their technology investments with their strategic objectives, ultimately fostering innovation and driving growth.

Marketing and sales professionals

should read this report to understand the competitive landscape, identify new opportunities and formulate strategies for differentiation. The report offers insightful analysis and data on customer behavior, industry trends and competitor activities, which can empower professionals to refine their marketing approaches and sales tactics. These insights help organizations enhance positioning and drive growth.



This quadrant assesses **managed IT, cloud and engineering** providers serving M&E enterprises, enabling **high-volume ingestion, scalable back ends** and **personalized experiences** powered by **AI/GenAI, real-time analytics** and **CDNs.**

Yash Jethani

Definition

This quadrant assesses providers offering managed and advanced IT, cloud and engineering services to media and entertainment (M&E) enterprises, including broadcasters, OTT platforms, sports brands, content distributors and publishers. These providers manage high-volume data ingestion pipelines, deliver resilient and scalable backend infrastructures, and orchestrate personalized experiences using real-time analytics, cloud, content delivery networks (CDN) and AI.

The providers offer solutions such as digital asset management, AIOps-enabled content lifecycle acceleration, metadata enrichment, anti-piracy services and multiscreen UX engineering. They integrate GenAI for applications such as editorial planning, asset generation (alternative cuts, voiceovers and descriptions), A/B testing and fan journey mapping. Providers also offer edge-aware content delivery, AI-led ad optimization and gamified loyalty programs to improve monetization.

Offerings integrate creative and IT functions via microservices, APIs and containers. Services support immersive formats, real-time overlays (for example, sports stats and voting), and hyperpersonalized advertising.

Eligibility Criteria

1. Deliver around-the-clock managed and **proactive IT/ business services to** M&E firms, including live streaming, broadcasting, publishing, OTT and adtech
2. Demonstrate next-gen capabilities in metadata enrichment, **MAM/ DAM, post-production workflows, video platforms, AI-led content discovery, archiving and preservation, and D2C ecosystems**
3. Offer **cloud-native support for platforms through composable architectures** (headless CMS/ ecommerce), with optimized CDN strategies
4. Offer **audience analytics, ROI measurement and GRC process alignment** with regulations such as COPPA
5. **Provide seamless systems integration with monetization engines and engineering capabilities** across platforms, devices or cloud, including modular experience/infrastructure
6. Ensure global and secure delivery, leveraging regional strengths in EMEA, while prioritizing **content security and IP protection**
7. Leverage **agentic AI and GenAI accelerators** for workflow automation and personalization, facilitating web3 applications for rights management and AR/VR
8. **Collaborate with major hyperscalers, M&E platform vendors or GCCs** to strategically promote sustainable assets
9. Showcase **reference case studies** demonstrating ongoing impact and competitiveness on IT and business processes
10. Demonstrate **talent pipelines** and other initiatives

Observations

Providers are aligning on cloud-first, data-driven reinvention secured in sovereign and hybrid architectures that meet GDPR, ePrivacy and emerging EU AI Act requirements. Common plays include AI-led metadata enrichment, QC automation, multilingual localization, rights and royalty automation, and adtech modernization, delivering 20-50 percent faster content preparation, 30-45 percent time-to-air gains, 10-20 percent revenue uplift and 20-35 percent cost reduction. Zero trust controls and explainable AI are now table stakes, with ESG embedded via carbon dashboards. Differentiation is emerging in strategy-to-run operating model redesign, distributed engineering pods in Central/Eastern Europe and trust frameworks for content authenticity. Coinnovation hubs and design-led studios are accelerating UX, live personalization and immersive fan experiences, while nearshore delivery supports EU data residency.

However, platform-heavy, consulting-plus-IP models can be overbuilt for midtier buyers, and some providers remain concentrated in a small number of large accounts. Complex localization and cross-border licensing slow end-to-end automation, while editorial guardrails and safe-zone AI patterns can extend GenAI timelines. Legacy adtech/martech and data lake integration add services overhead, and many engagements need to pivot from IT SLAs to KPI-based managed services (yield, viewership, retention). To win, providers must modularize offerings for faster deployment, deepen alignment with creative production, strengthen data governance and rights workflows, and prove ROI with outcome-priced, SLA-backed managed service constructs.

Accordingly, modular delivery with precertified sovereign-by-design AI workflows and outcome-priced managed services that prioritize cross-border compliance, editorial safety and rapid localization is essential to de-risk multicountry rollouts.

From the 53 companies assessed for this study, 29 qualified for this quadrant, with 10 being Leaders and one a Rising Star.

accenture

Accenture drives EMEA's media reinvention through cloud-first consulting, AI-powered advertising and ESG-embedded strategies. Its integrated approach connects creative, operational and sustainability goals across broadcasters and studios.

Amdocs

Amdocs delivers hybrid cloud and AI-powered managed IT services, via Amdocs Studios, for Europe's broadcasters and streaming platforms. It modernizes workflows, metadata and content security, while enabling scalable, localized and compliant operations across EMEA.

Atos

Atos Group modernizes media operations via BNCS™, SDI-to-IP transition and AI-driven content automation. Combining enterprise IT, cybersecurity and ESG consulting, it delivers resilient, cloud-based broadcast and digital workflows for broadcasters and content owners worldwide.

Capgemini

Capgemini modernizes Europe's media supply chains through AI, automation and cloud platforms, ensuring compliance, speed and sustainability for leading broadcasters and studios.

EPAM Systems

EPAM Systems modernizes Europe's media supply chains through AI, automation and cloud platforms, ensuring compliance, speed and sustainability for leading broadcasters and studios.

HCLTech

HCLTech delivers AI-native, cloud-compliant media IT managed services across EMEA, modernizing content supply chains, adtech and rights management through automation, sustainability and regulatory alignment.

IBM

IBM delivers hybrid cloud-, AI- and automation-based media IT services for EMEA broadcasters, studios and OTT platforms, modernizing content workflows, adtech and compliance under watsonx. It drives operational resilience, ESG reporting and trusted AI adoption.

Infosys

Infosys enables European M&E organizations to digitize, personalize and decarbonize content workflows through Topaz™ AI, Cobalt™ Cloud and Infosys Media Platform™.

TATA CONSULTANCY SERVICES

TCS' modernizes EMEA's M&E enterprises through AIBX™ Studio, Cognix™ for Media and C2PA™-aligned trust solutions for scalable and compliant digital operations.

wipro

Wipro provides AI-enabled media modernization, sovereign AI hosting and rights management automation through Vantage™, WeGA 2.0™, Designit™ and VisionEDGE™, backed by localized labs and hyperscaler alliances.

Virtusa (Rising Star)

Virtusa (Rising Star) delivers AI-first, engineering-led media IT and business process managed services for European broadcasters, publishers and studios, driving automation, content localization and data monetization under full compliance via MediaHub™ and Helios™ GenAI frameworks.

Atos Group

Leader

"Atos Group is a benchmark for media operations modernization – uniting BNCS™ control, cloud automation and responsible GenAI to enable secure, sustainable and AI-assisted content supply chains for global broadcasters and studios."

Yash Jethani

Overview

Atos Group is headquartered in Bezons, France. It has more than 70,000 employees across 67 countries, operating under two brands — Atos for services and Eviden for products. In FY24, the company generated €9.6 billion in revenue, with Tech Foundations as its largest segment. Atos Group digitalizes media operations through BNCS broadcast control, SDI-to-IP migration, cloud workflow automation and GenAI-enabled metadata intelligence. Its Digital Decarbonization Assessment quantifies energy savings and carbon footprint across media production and cloud operations, aligning IT strategy with sustainability goals. In EMEA, Atos Group focuses on BNCS™ and IP broadcast modernization.

Strengths

BNCS™ broadcast network control system leadership: Atos Group's proprietary BNCS™ platform orchestrates live production and broadcast assets across SDI and IP equipment using NMOS-standard interfaces. Deployed at BBC, Sky, Bloomberg, Warner Bros and Discovery, BNCS™ enables unified multivendor control, reduces integration costs and simplifies migration to IP infrastructures.

Media transformation accelerators: Project accelerators speed and derisk digital transformation — SDI-to-IP transition design, media control systems deployment, cybersecurity and network design. These blueprints shorten project timelines by approximately 30 percent and align with EBU and SMPTE standards for live broadcast.

Enterprise IT convergence and cloud workflows: Atos Group brings two decades of experience in enterprise IT delivery into media operations, combining CRM, cybersecurity, workflow automation and analytics. Its CloudPlatform governs workflows across AWS, Azure and OVH Cloud with feature-rich APIs for monitoring and cost management, supporting broadcast as a service.

AI/GenAI for content and operations: The Polaris AI Platform and its agentic framework automate metadata tagging, content classification and audience segmentation. Integration with Salesforce and SAP accelerates campaign optimization and rights management. Atos Group applies responsible AI governance and explainable AI to protect brand integrity.

Caution

While BNCS™ strengthens Atos Group's broadcast leadership, OTT and streaming clients seek faster alignment with cloud-native partners and GenAI content solutions. Expanding market awareness beyond broadcast remains key.

Appendix

The ISG Provider Lens® 2025 – Media and Entertainment — Managed and Next-gen IT Services and Solutions study analyzes the relevant software vendors/service providers in the EMEA market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Study Sponsor:
Iain Fisher

Lead Analyst:
Yash Jethani

Editors:
Poulomi Nag, Dona George and Esha S Pal

Research Analyst:
Shatakshi Singh

Data Analyst:
Shilpashree N

Consultant Advisors:
Julee Held, Geoff Wahl, Iain Fisher, Susanta Dey, Rakesh Parameshwaran, Jon Harrod and Shriram Natarajan

Project Manager:
Yeshashwi Nagarajan

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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 service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of the December and 2025 when the fact check stage is closed for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

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

The study was conducted in the following steps:

1. Definition of Telecom, Media and Entertainment Industry Services and Solutions name market
2. Use of questionnaire-based surveys of service providers/vendors 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 and vision
   * Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * Technology advancements

Lead Analyst

Yash Jethani
Senior Manager and Principal Analyst

Yash Jethani's professional experience is centered on telecommunications, media and technology (TMT), spanning thought leadership, market and competitive research, consulting, business development, due diligence and account management across corporate marketing, risk, strategy and sales functions.

Prior to his current role at ISG, Yash worked at KPMG in India, supporting its national TMT practice in advisory, thought leadership and strategic pursuits. At IDC, he delivered custom and syndicated research for telecommunications and IoT clients across APAC. He also held roles at CGI and TCS, supporting corporate and account marketing initiatives focused on next-generation IT delivery in the telecommunications vertical. He currently serves as a lead analyst for ISG's Provider Lens® global research studies across enterprise networking, robotics and physical AI, and cybersecurity.

He holds a PGDM in Telecom and IT, an engineering degree in Computer Science, and a cybersecurity certification. He is also a TM Forum-certified business development manager.

Research Analyst

Shatakshi Singh
Research Analyst

Shatakshi Singh is a Research Analyst at ISG and is responsible for supporting Provider Lens® studies on Telecommunication, Media and Entertainment Services, Networking – Software defined Solutions and Services and Enterprise Managed Network Services. She works closely with the Lead author from diverse regions in the research process. She also authors global summary reports. Prior to this role, she has completed her masters i.e. MBA from Amity Business School, Amity University Noida.

Author and Editor Biographies

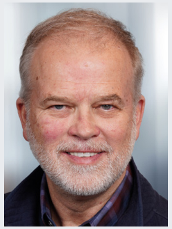
Study Sponsor

Iain Fisher

Director, Research

Iain Fisher is ISG's head of industry research and market trends. With over 20 years in consulting and strategic advisory, Iain now focuses on cross industry research with an eye on technology led digital innovation, creating new strategies, products, services, and experiences by analysing end-to-end operations and measuring efficiencies focused on redefining customer experiences. Fisher is published, known in the market and advises on how to achieve strategic advantage. A thought leader on Future of Work, Customer Experience, ESG, Aviation and cross industry solutioning. He provides major market insights leading to changes to business models and operating models to drive out new ways of working.

Fisher works with enterprise organizations and technology providers to champion the change in customer focused delivery of services and solutions in challenging situations. Fisher is also a regular Keynote speaker and online presenter, having authored several eBooks on these subjects.



IPL Product Owner

Jan Erik Aase

Partner and Global Head – ISG Provider Lens®/ISG Research

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes;. With over 35 years of experience, he is highly skilled at analyzing 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 partner and global head of 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.

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.
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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ISG

ISG (Nasdaq: III) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

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.

For more information, visit isg-one.com.

DECEMBER, 2025

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