

Telecom – Managed and Next-gen IT Services

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

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Atos



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EMEA telcos pivot to AI-native, cloud-first TechCo models with compliant 5G monetization

Purpose and context of the report

This report evaluates the state of telecom IT services in EMEA, reflecting how service providers are enabling operators' transition into AI-native, cloud-first and open ecosystem TechCo models. It synthesizes findings from all provider materials shared, examines market maturity and identifies the evolving priorities of EMEA telecom buyers across operations support systems (OSS)/business support systems (BSS) modernization, network cloudification, 5G monetization, AIOps, automation and GenAI-enabled operations.

The EMEA telecom market faces a significant legacy burden, strict regulatory requirements [GDPR and Network and Information Security Directive 2 (NIS2)], flat average revenue per user (ARPU) and a slow yet steady 5G

monetization path. Operators prioritize cost optimization, cloud-native modernization, compliance-aligned transformation and network and IT convergence. Providers in EMEA demonstrate a strong focus on cloud-native OSS/BSS modernization, microservices-based digital stacks, and AIOps- and GenAI-led automation for observability, assurance and NOC transformation. They are also prioritizing sovereign cloud and compliant data architectures, Open Radio Access Network (O-RAN) and network cloud engineering, and B2B2X enablement for manufacturing, transport and the public sector.

Market overview and trends snapshot with opportunities (for providers)

Cloud-native OSS/BSS is becoming the EMEA baseline:

Leaders demonstrate strong alignment with TM Forum (TMF) and Open Digital Architecture (ODA), supported by microservices-based designs and API-first integration frameworks. Providers use their proprietary platform accelerators to modernize legacy stacks. Hence, OSS/BSS simplification and telco-wide cloud

AIOps-led
cloud-native
OSS/BSS drives
cost efficiency,
uptime and
B2B2X value
across EMEA.



modernization become a clear opportunity for providers.

AIOps and GenAI dominate operational transformation:

Providers emphasize autonomous assurance, noise reduction, intent-driven closed loops and predictive operations. AIOps and GenAI-enabled autonomous operations represent the next major opportunity for the industry.

Compliance and sovereignty steer investments:

GDPR, NIS2 and multicountry data localization requirements drive traction for Capgemini, Atos, HCLTech, Infosys, and others. Providers highlight security, policy automation and auditability (zero trust, NIST and advanced threat analytics). Hence, multicountry transformation governance emerges as a key priority for providers.

Network cloudification is accelerating:

HCLTech (CTG acquisition), Tech Mahindra [O-RAN and multiaccess edge computing (MEC), Tata Elxsi (NEURON™) and Prodapt

[software defined networking (SDN)/network function virtualization (NFV)] reveal strong engineering depth in the area of network cloudification. Network-IT fusion becomes a clear EMEA operator priority.

The following two opportunities arise for providers:

- 5G enterprise and private MEC rollout support
- Network APIs and network-as-a-service (NaaS) monetization frameworks

Monetization focus shifts to B2B2X:

Enterprises demand private 5G, edge-native services, connected operations and exposure to NaaS APIs. Tech Mahindra, Capgemini, Infosys, HCLTech and TCS shape emerging strategies around marketplaces, network slicing, identity management and API-led monetization. Data platforms for customer insights, billing accuracy and margin uplift present a clear opportunity for providers.

Some providers consistently exhibit broad transformation capabilities, AI-native operations, cloud-native BSS and compliance

depth. Others demonstrate solid engineering strength but require stronger GTM scale or more consulting-led transformation models, while a few others excel in niche capabilities (O-RAN, fiber build and API monetization) and deliver segment-specific integration (API, BSS microservices and AIOps-led NOC).

Despite the varying provider capabilities, several pain points persist. These include deep technical debt, scattered BSS/OSS estates, limited cross-domain data integration, and talent shortages in cloud-native, O-RAN and AIOps. Providers also face compliance overhead from multicountry regulations, pilot-to-production challenges in GenAI or agentic AI use cases and high TCO of multivendor legacy operations.

ROI highlights and value KPIs:

- AIOps-driven mean time to repair (MTTR) reduction of 30-70 percent
- Legacy modernization efficiency, delivering 20-40 percent TCO optimization across tier 1 system integrators (SIs)

- Automation gains, including 25-50 percent ticket deflection or auto-remediation potential
- Cloud transformation benefits, enabling up to 65 percent faster onboarding and 30-40 percent cost savings
- Network engineering productivity improvements of 20-30 percent in fiber and 5G rollout
- GenAI-led efficiencies, resulting in 15-25 percent price reduction in managed services

Additional data-driven KPIs include SLA compliance improvements, high percentage of zero touch tickets, automated root cause analysis (RCA) rates, order fallout reductions, service uptime improvements and network fault prediction accuracy.

Vertical-specific insights and recommendations

Tier 1 communication service providers (CSPs), including Vodafone, BT, DT, Orange and Telefónica, prioritize OSS/BSS consolidation, AIOps-led observability, compliance assurance, and network cloud. They also lead in co-



innovation labs with partners such as HCLTech, Infosys and Capgemini to address multicountry transformation needs. Tier 2 CSPs need modular, cost-optimized modernizations and depict strong interest in O-RAN, AI-led assurance and cloud-managed services. Fiber operators require engineering-intensive support, which is ideally delivered by India-based SIs.

Technology adoption and regulatory implications

Client success snapshots include an Indian SI that has supported a major European operator for 18 years in ADM and testing as part of a large modernization program. Another Indian SI offered a live demonstration of network APIs at MWC25 in collaboration with Telefonica, Orange and T-Mobile. A third Indian SI partnered with Verizon to secure numerous telco network deals in the region. Additionally, a digital engineering niche Indian SI developed POCs for autonomous networks with European telcos using its proprietary platform, while another niche provider delivered significant OpEx improvements for fiber deployments.

The telecom industry in EMEA is undergoing

a significant transformation driven by AI adoption, cloud migration and 5G deployment. Enterprises are leveraging AI for customer service, content recommendations and network optimization while accelerating their shift to multicloud architectures and edge computing. The rollout of 5G standalone networks and the rise of content super-aggregator platforms are reshaping service delivery models.

These technological advancements are unfolding against a backdrop of new EU regulations, including the Digital Services Act, AI Act, Digital Markets Act, NIS2, ePrivacy Directive, Strong Customer Authentication and the European Media Freedom Act. These regulations are introducing stricter requirements around content quotas, payments, data protection, anti-competition and algorithmic transparency. The European Commission's Digital Markets Act and Media Freedom Act significantly influenced industry strategies, while concerns regarding energy costs and infrastructure investment challenge operators' profitability. The European Commission has also allocated €865 million to improve digital connectivity and support digital

innovation in EU member states through 5G, fiber and quantum communication projects.

Legislators' Connective Collaborative Computing narrative positions telecom providers and cloud hyperscalers in the same converged landscape from a regulatory standpoint. However, significant differences exist between the two groups in terms of data egress costs, vendor lock-ins and multivendor strategies. According to ISG, cooptation represents the best way forward, as it emphasizes leveraging providers' strengths, enhancing efficiency through AI and autonomous systems, and strengthening interconnectivity among cloud-to-cloud, cloud-to-edge and edge-to-edge environments.

Industry outlook

Key actions that providers can implement in the next 6-12 months include introducing AIOps for fault prediction and RCA automation, initiating microservices-led OSS/BSS decoupling, deploying GenAI-assisted field operations/workforce enablement, launching cloud FinOps for cost stabilization and strengthening compliance and data sovereignty frameworks.

They also need to assess technical debt, data sovereignty and cloud readiness; stabilize operations using AIOps and observability stack; modernize OSS/BSS with phased microservices; automate NOC/SOC with GenAI pipelines; and ultimately monetize via APIs, slicing and B2B2X.

The next-stage transformation pathways for 2025-2027 include targeting autonomous Level 3/4 operations, weaving AI-native orchestration (from intent to action), unifying data fabric across IT and network, providing O-RAN assurance supported by cloud RAN analytics and enabling AI-led monetization of enterprise 5G services. Key trends to watch include the number of telecom GenAI copilots and autonomous NOCs that deliver measurable ROI in client projects, along with the verification of event-driven network operations within a sovereign edge and private MEC deployments to support a marketplace-led 5G monetization model.

CXO priorities

Linking these pathways to CxO priorities will require a balanced focus on growth (for B2B2X frameworks, enterprise 5G and API



monetization), cost (with AIOps, cloud FinOps and network automation), CX [including GenAI-led care and proactive net promoter score (NPS) improvement] and risk (embedding GDPR, NIS2, sovereignty and auditability into client deliveries). These priorities will need alignment with enterprise transformation for securing telco-to-TechCo transition, platformizing OSS/BSS/CX (ISG includes a separate Integrated OSS/BSS/CX Platform Solutions quadrant as part of its global study in 2025, building open ecosystems and accelerating digital experience for enterprise customers.

Call to action

Telecom IT in EMEA is undergoing a decisive shift toward AI-native, cloud-first and compliance-secure ODAs. Providers must help operators navigate legacy-to-modern transitions while enabling new enterprise revenue models.

Telecom IT in EMEA is shifting to AI-native, cloud-first and open TechCo architectures under GDPR and NIS2. Providers modernize cloud-native OSS/BSS and O-RAN, integrate network and IT, and automate assurance with AIOps and GenAI to reduce MTTR, deflect tickets and accelerate onboarding. Sovereign cloud and data fabrics enable compliant B2B2X monetization via APIs and NaaS. Priorities include FinOps, private 5G, intent-driven operations and multicountry governance.



 Provider Positioning

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



 Provider Positioning

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



 Provider Positioning

	Strategy and Enablement Services	Telecom - Managed and Next-gen IT Services
HARMAN	Not In	Contender
HCLTech	Leader	Leader
IBM	Leader	Leader
Infosys	Leader	Leader
Kearney	Product Challenger	Not In
Kyndryl	Not In	Product Challenger
LTIMindtree	Not In	Contender
McKinsey & Company	Leader	Not In
NTT DATA	Not In	Product Challenger
Persistent Systems	Not In	Product Challenger



 Provider Positioning

	Strategy and Enablement Services	Telecom - Managed and Next-gen IT Services
Prodapt	Contender	Product Challenger
Publicis Groupe	Market Challenger	Not In
PwC	Leader	Not In
Simon Kucher	Contender	Not In
Sopra Steria	Contender	Contender
Sutherland	Not In	Contender
Tata Elxsi	Not In	Product Challenger
TCS	Product Challenger	Leader
Tech Mahindra	Leader	Leader
Torry Harris	Not In	Rising Star ★



 Provider Positioning

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	Strategy and Enablement Services	Telecom - Managed and Next-gen IT Services
TP	Not In	Market Challenger
UST	Not In	Product Challenger
Virtusa	Not In	Product Challenger
Wipro	Product Challenger	Leader



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

Simplified Illustration Source: ISG 2025



Definition

Telecom and media (TME) enterprises are rapidly shifting from siloed models to platform-led digital operations. As IT and network domains converge, providers are rethinking service delivery by embedding AI, automation and modular architecture. With rising demand for immersive experiences, monetizable platforms and real-time content, transformation priorities are accelerating. This competitive study benchmarks leading IT/business service and solution providers across six well-defined quadrants that highlight the most critical capabilities reshaping TME enterprises in an AI- and automation-led era. The quadrants span Strategy and Enablement Services (providers leverage domain expertise to assist with M&A, operating model redesign and go-to-market transformations powered by GenAI and emerging technologies); Telecom — Managed and Next-gen IT Services; Media and Entertainment — Managed and Next-gen IT Services (providers deliver cloud migration, software-defined networks, AI-led CX and scalable engineering services); Integrated OSS/BSS/CX Platform Solutions (providers enable

open, modular and monetizable product and service infrastructure); Connectivity Hardware and Industrial Edge Solutions (specialists deliver AI-enabled distributed infrastructure); and Content Supply Chain Management Solutions (providers support revenue, rights management and advertising operations for enhanced ROI through programmatic advertising, tracking and automated workflows). This report helps sourcing leaders and transformation teams identify partners with proven scale and expertise, co-innovation models and future-ready solutions that align with the convergence of cloud, AI, edge and network evolution.



Scope of the Report

This ISG Provider Lens® quadrant report covers the following two quadrants for services/solutions: Strategy and Enablement Services and Telecom — 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)
- 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.

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.

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.

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

Who Should Read This Section

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 providers in EMEA that deliver strategy and enablement services to telecom, media and entertainment (TME) organizations. The services encompass 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, as well as 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 understand how adopting digital solutions for modernization can significantly enhance their ability to identify emerging market opportunities. By 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 equips 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.



**Telecom, Media and Entertainment Industry Services and Solutions
Strategy & Enablement Services**

EMEA 2025



This quadrant assesses **telecom** partners for **strategy and enablement**, applying **AI and GenAI, 5G, O RAN** and **hybrid cloud** to scale networks, unlock **monetization** and strengthen **governance and ESG**.

Yash Jethani



Strategy and Enablement Services

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, data analytics, Industry 4.0 and cloud computing into their service offerings. Additional support includes

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 co-innovation hubs or testbeds
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
5. 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, security and confidentiality clauses
7. Demonstrate **alignment with various stakeholders** through case studies
8. **Publish and influence industry perspectives** on TME strategy, AI adoption and monetization trends via events, whitepapers or forums.



Strategy and Enablement Services

Observations

Providers in this quadrant differentiate themselves through end to end telecom and media enablement that integrates 5G, cloud, AI and ESG into connected industry frameworks. They deliver outcome focused *stratעות*, blending consulting, design and engineering to advance O-RAN and API monetization, while building pan regional digital cores on sovereign cloud. They also reinforce responsible AI and AI factories, support M&A integration and operating model harmonization, and enable policy smart orchestration with GDPR and NIS2 compliance, uniting BSS/OSS with security as a service and KPI based delivery.

Common strengths among providers include AI native operations, standardized digital cores and open network integration aligned with TMF and GSMA. They prioritize sovereign cloud compliance and governance frameworks shaped by GDPR and the EU AI Act, while monetizing APIs, network slices and content rights as part of the broader ESG linked transformation. Their deliver methods embed benefit tracking, federated data, privacy by design and continuous model auditing.

In parallel, hyperscaler co innovation and labs accelerate private 5G, digital twins and business workflow automation to drive cross border reuse and rapid time to market.

Common cautions reflect regulatory fragmentation and the challenges associated with multicountry harmonization that can slow execution. Success depends on client governance maturity, data quality and residency. Providers continue to face gaps in integration flows, middleware and custom development, alongside the risks of delivery fragmentation across business units.

Ecosystem intensive models may challenge midsize enterprises, while local regulatory requirements can extend deployment timelines. AI factories often require significant data curation, and sovereign or cyber mandates can raise TCO without phased rollout, thereby reinforcing the need for stringent change management and a careful balance between speed and compliance.

From the 44 companies assessed for this study, 30 qualified for this quadrant, with 10 being Leaders and one Rising Star.

accenture

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

Capgemini

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

Deloitte.

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's global consulting unit, EY-Parthenon, drives strategic enablement in EMEA TME markets through responsible AI, ESG and open network advisory, aligning compliance, innovation and platform growth for sustainable digital transformation.

HCLTech

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



IBM shapes TME enablement across EMEA through watsonx-powered AI factories, open network integration and ethical AI governance, aligning innovation with compliance and strengthening customer trust.



Strategy and Enablement Services



Infosys Consulting 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

McKinsey & Company helps EMEA-based telcos optimize capital allocation, standardize cross-market operations, and scale AI and cloud transformation under regulatory and ESG frameworks. Its strength lies in its strategic depth and CEO-level influence over operational scale.



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



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



Atos Group (Rising Star) is an AI-powered telecom and media partner in EMEA, integrating telecom modernization, media operations [Broadcast Network Control System (BNCS) and IP broadcast], data monetization and security as a service, while prioritizing sovereignty and KPI-based delivery.



Atos Group



“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 offerings (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 TMF 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 mid-tier 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.





Telecom – Managed and Next-gen IT Services

Who Should Read This Section

This report is valuable for providers offering **telecom managed and next-gen IT services** in EMEA to understand their market position and for enterprises looking to evaluate these providers. This quadrant highlights the changing market dynamics of these services, which involve managing critical network infrastructure and applications.

Technology leaders and line of business (LOB) heads

Should read this report to adopt emerging technologies, such as AI and cloud solutions, to stay competitive and innovative in telecommunications operations. By embracing the insights and recommendations presented in this report, leaders can better navigate the complexities of technological advancements and implement strategies that enhance operational efficiency.

Enterprise CIOs, CISOs and CTOs

Are encouraged to read this detailed report to assess how service providers can significantly improve the performance, governance, risk management and security of telecommunication functions. The report outlines how aligning these service improvements with the specific business needs and objectives of the organization can lead to enhanced operational efficiency and effectiveness.

Strategy professionals

Should read this report to understand how service providers help shape IT strategy goals and support decision-making on partnerships and cost reduction initiatives. By exploring these insights, professionals can see how service providers influence strategy and enhance efficiency. This understanding is crucial for aligning IT objectives with broader business goals, fostering collaboration and driving organizational success in a competitive landscape.

Marketing and sales professionals

Should read this report to understand the competitive landscape within the telecommunications market, identify new opportunities and formulate strategies for differentiation. The insights provide guidance on market trends, customer preferences and innovation, enabling teams to create effective campaigns and improve client engagement. This knowledge will help professionals navigate challenges and seize opportunities, driving revenue growth and long-term success.



Telecom, Media and Entertainment Industry Services and Solutions
Telecom – Managed and Next-gen IT Services

EMEA 2025



This quadrant assesses EMEA telecom partners that enable the shift toward **AI native, cloud first TechCo**. It evaluates **cloud native OSS/BSS, AIOps/GenAI operations, 5G/O RAN network cloudification, sovereign cloud/compliance and B2B2X/API monetization**.

Yash Jethani



Definition

This quadrant assesses providers offering next-gen IT or process outsourcing and engineering services for telcos. These providers support the design, deployment and lifecycle management of hybrid IT, OSS/BSS, cloud systems and customer-centric COTS/open source platforms. Their offerings include legacy modernization, agile IT delivery, data-driven operations and network-to-cloud convergence.

Providers embed GenAI for predictive fault management, SLA optimization and incident avoidance. Integrating programmable interfaces with AIOps-enabled observability is crucial. Providers must support multilayered architecture transformation, including on-premises solutions, cloud-native applications and edge workloads, for complex networks.

These services are often delivered through modular, comanaged or outcome-linked contracts, focusing on business value and operational agility. Providers support telco cloud and radio environments, enable partnerships for unified platform integration and drive full-stack IT modernization.

Eligibility Criteria

1. Offer end-to-end **managed and proactive IT services**, spanning application development, modernization or testing/support, to telcos
2. Demonstrate experience in using **OSS/BSS, order to cash, revenue assurance or inventory management to optimize business/IT processes and enhance CX, with support for data or AI integration**
3. Use **advanced delivery models** such as Agile, DevSecOps and microservices for **cost optimization, automation and scalability**
4. Integrate **Gen AI, agentic AI, analytics and workflow orchestration** into core telco IT processes with clear ROI
5. **Demonstrate regional IT/business delivery capabilities** for telco clients in **EMEA**, covering various **network functions** and **vendor technologies**
6. **Engage in co-innovation within cloud/platform/software engineering** by leveraging focused frameworks and IPs for product modernization, network/security alignment, intelligent service assurance (in collaboration with partners like Aduna) and integrated CX
7. Have vendor certifications and ecosystem partnerships across **data, AI, ITSM, cloud, security, SDN*, virtualization, containers and quality**
8. Develop **talent pipelines** and foster cultural alignment through GCC enablement and other initiatives
9. Adhere to **regulatory and ESG compliances, cybersecurity frameworks and sovereignty requirements**
10. **Showcase case references** for the IT/business processes



Telecom – Managed and Next-gen IT Services

Observations

Differentiated strengths of providers in this quadrant include GenAI-driven operations, connected-industry IP and sustainability-centric governance that accelerate the telco-to-TechCo shift. Zero touch automation and agentic AI enable autonomous network and IT Ops, supported by hybrid cloud governance for sovereign, compliant delivery. TMF-aligned OSS/BSS and design-build-run execution models facilitate modular decoupling and rapid rollout of cloud network functions (CNFs). API-first integrators add reusable marketplace patterns, site reliability engineering (SRE) platforms and governed data products to improve assurance and time to market.

Common strengths include AI-native managed services, AIOps for predictive assurance, GenAI copilots for triage and remediation, and cloud-native OSS/BSS with API-first integration. Providers emphasize sovereign cloud, GDPR and NIS2 compliance, zero trust security and ESG-aligned delivery. O-RAN, edge/MEC and network-IT fusion are increasingly prevalent, supported by co-innovation hubs, nearshore centers and multivendor interoperability.

FinOps and unified observability drive cost control, while intent-driven automation improves SLAs, uptime and rollout velocity.

Cautions include the complexity that small CSPs face when adopting multilayer toolchains and sovereign controls and the reliance on CI/CD maturity, cross-vendor alignment and strong governance to realize ROI. Extended timelines resulting from data curation requirements, EU approvals and legacy procurement continue to create delays. Partner stack integration introduces delivery risk, while providers' increased focus on tier 1 operators limits their ability to serve midsize enterprises. Additionally, limited OSS/BSS product ownership increases dependence on third-party roadmaps, requiring phased decoupling and a unified consult-to-run execution.

From the 44 companies assessed for this study, 29 qualified for this quadrant, with 11 being Leaders and one a Rising Star.

accenture

Accenture is a leading telecom IT partner in EMEA, combining GenAI-driven operations, connected-industry IP and sustainability-centric governance to help operators evolve into platform-based TechCos.

Atos

Atos Group modernizes telecom IT through AIOps, automation and hybrid cloud governance. Its SyntBots®, Polaris™ AI and 5Guard™ frameworks deliver secure, autonomous network and IT operations that accelerate 5G and edge transformation across EMEA.

Capgemini

Capgemini manages AI-enabled telecom operations across EMEA through automation, cloud-native OSS/BSS and sovereign network capabilities that integrate engineering, compliance and innovation.

cognizant

Cognizant's EMEA telecom managed services integrate AIOps, cloud-native OSS/BSS and secure 5G operations to deliver intelligent, regulatory-compliant networks for regional CSPs.

DXC TECHNOLOGY

DXC Technology enables resilient telecom IT modernization through TMF-aligned delivery, GenAI-powered operations and strong IT governance frameworks, driving compliance, stability and measurable outcomes across EMEA.

HCLTech

HCLTech delivers AI-enabled telecom managed services across EMEA through AI Force, AI Foundry and NetBOT™, combining predictive assurance, hybrid cloud orchestration and ESG compliance to power intelligent, future-ready telco operations.



Telecom – Managed and Next-gen IT Services



IBM delivers a disciplined, data-centric approach to telecom transformation in EMEA, combining watsonx-powered automation with hybrid-cloud integration to modernize OSS/BSS estates under strict regional sovereignty and compliance requirements.



Infosys delivers cloud-native, AI-governed IT operations for EMEA telecom operators, integrating Topaz, Cobalt and Live Operations for predictive assurance and responsible automation.



TCS supports EMEA-based telecom operators in advancing convergence, M&As and sovereign AI initiatives by enabling telco growth through AI, automation and sustainability.



Tech Mahindra is known as a design-build-run partner for OSS/BSS, network cloud, security and AIOps, offering sovereign cloud options and outcome-based commercials.



Wipro supports EMEA telcos with AI-native managed IT and network automation, sovereign cloud integration and green operations frameworks through AI360, FullStride Cloud Studio 2.0 and WeGA Sovereign AI.

Torry Harris

Torry Harris (Rising Star) is an API-led integrator with EMEA telco credentials, delivering channel modernization, OSS/BSS integration, SRE platforms, governed data and AI products. Its strong TMF alignment and IP assets accelerate partner enablement and B2B2X initiatives.





“Atos leads telecom managed services with zero-touch automation, agentic AI and sovereign-cloud/data delivery, empowering 5G operators to achieve autonomous network operations and resilient, KPI-driven modernization.”

Yash Jethani

Atos Group

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 modernizes telecom IT landscapes through autonomous network operations, cloud migration and AI-driven service automation for 5G and edge ecosystems. Atos leverages over 20 years of network automation expertise through its Autonomous Network framework and SyntBots® suite, delivering closed-loop assurance, predictive remediation and orchestration. Its 5Guard™ suite adds threat modeling and AI-driven anomaly detection.

Strengths

Vertical TME portfolio with sovereign posture:

Atos' EMEA strategy combines vertical TME offers (OSS/BSS, 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 telcos. Its DevSecOps and compliance tools support sovereign cloud, AI and content protection mandates. The company focuses on NFV, containerization and cloud migration to optimize network operations, thereby helping telcos achieve Level 4 network autonomy and enhance network security.

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 TMF autonomy levels.

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

Adoption of Atos' multilayer toolchain and sovereign cloud controls may raise project complexity for smaller CSPs. Realizing full ROI relies on CI/CD maturity, cross-vendor alignment and disciplined governance.





Appendix

The ISG Provider Lens® 2025 – Telecom, Media and Entertainment Industry Services and Solutions study analyzes the relevant software vendors/service providers in the EMEA market, based on a multiphased 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 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 November 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 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 main 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



Author and Editor Biographies



Lead Analyst

Yash Jethani
Senior Manager and Lead 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.





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