ISG Provider Lens™

Media and Communication Services

A research report comparing provider strengths, challenges and competitive differentiators

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Report Author: Rohan Thomas

5G and OTT need scalable and agile digital solutions.

The outbreak of the COVID-19 pandemic accelerated the consumption of over-the-top (OTT) platforms, further accelerating the disruption of the well-established media and entertainment business ecosystem. In addition to streaming new content, many OTT players act as distributors, pooling content from different media companies and offering it to their customers seamlessly. End users in this rapidly developing ecosystem will require robust content management systems that automate the content supply chain and royalty rights without disrupting the quality of experience (QoE) of their customers.

While in its infancy, the rise of the metaverse is expected to have significant implications on the way content is consumed. As it continues to mature, the metaverse will require solutions that can address storage requirements and improve interoperability in a multivendor environment.

During the pandemic, most enterprises in the U.S. adopted the work-from-home model. Consequently, there was significant strain on networks due to the surge in traffic. Network operators experienced a deterioration in QoS and QoE because they were unable to efficiently scale their infrastructure. Their challenges were exacerbated as they strived to rollout 5G services.

The rollout of 5G services in the U.S. is, however, not as pronounced as it is in other regions that already have a well-established telecom infrastructure in place. This is because the second

Slim margins and low ARPUs hinder the ability to digitize

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generation of LTE networks, which are already rolled out in U.S. markets, have speeds that are almost comparable with those offered by 5G networks. Given its proclivity to support a larger number of devices, 5G would instead be suited for highly automated industries that would need a private network, one that has a significantly high bandwidth that can support large volumes of automated devices and sensors.

Significant constraints to the rollouts of such private networks include interoperability issues that arise during integration, and the costs associated with the overhaul of legacy components already embedded into the network. There is still a significant push for the deployment of 5G services in the telecom sector, with many tests and pilots being carried out for private networks. However, the costs associated with rollouts and decreasing ARPUs are a huge deterrent.

To reduce customer churn and improve ARPU, telecom operators are adding other value-added services such as financial services. The inclusion of payment systems such as digital wallets, however, leads to a significant transformation of the telecom company's operations support system (OSS) and business support system (BSS).

With increasing demand for enhanced customer experience, the media and communications industries must focus on improving the quality of network services to ensure that the overall satisfaction of customers is exceeded consistently.

The following key trends were observed during the last year:

- **Cloud transformation services:** Telecom operators are under pressure to deploy telco clouds to enable technologies such as virtual network functions (VNFs), thereby improving resiliency and service availability. End users, particularly from the telecom industry, would prefer a hybrid, multicloud approach over a public cloud transformation, as many of the core components of their network continue to be on-premises. The cloud ecosystem has given an unparalleled advantage to OTT players over their counterparts in the legacy media space. To stay apace with the OTT ecosystem, legacy media companies are looking for solutions that can efficiently migrate most of their infrastructure to the cloud. The demand for scalable infrastructure and storage solutions on the cloud will increase further, with the emergence of metaverse.
- **Software-defined network (SDN) capabilities:** The rollout of SDN, and its subsequent evolution to software-defined wide area networks (SD-WAN), software-defined local area networks (SD-LAN) and intelligent edge, is an important enabler for next-generation networks such as 5G. The technologies redistribute control from the core of the network to the edge, thereby significantly improving agility. The importance of intelligent edge compute will increase with the proliferation of low-latency applications for the 5G network.
- **High degrees of automation and AI:** Technologies such as AIOps, cognitive automation and robotic process automation are used by end users across the media and communication industries to achieve rapid digital transformation of their business and IT operations. Automation and AI-based methods enhance network orchestration and reduce human intervention, thereby improving the revenue margins of the end users. Also, automation technologies, coupled with enhanced data analysis, are used extensively in services such as royalty rights management.

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- **End-to-end consulting services:** End users participate in a market characterized by significant customer churn and limited customer growth. The deployment of next-generation IT services such as 5G requires high levels of capital expenditure from operators to make it commercially viable. Consequently, service providers are witnessing a shift from traditional relationships with end users to a more collaborative one. This shift is characterized by a surge in interest in digital consulting services, which templatize the business transformation based on the nature of end user and the adoption of value and outcome-based revenue over fixed revenue models.
- **Increase in security across networks:** Telecom operators and media companies in the U.S. have become targets of cyberattacks and disinformation campaigns. Therefore, companies are investing in solutions that can analyze threats and achieve zero-trust protection of endpoints across the cloud and legacy data center infrastructure.
- **Blockchain:** Media companies are analyzing blockchain technology benefits and applications in the industry's service lines, such as digital rights, content management and payment gateways. Large companies are incubating or acquiring small blockchain specialists to enhance their business transformation capabilities.
- **API- and microservices-based architectures:** While the media and communications landscape continues to evolve, end users will require an open architecture built on APIs to diversify their services. Microservices form an indispensable part of the modern and complex media and communications network architecture. They support the design and implementation of edge services for IoT applications.
- **Data monetization:** Media and communications end users leverage powerful, data-driven solutions to derive meaningful insights from unstructured data from different sources. Use cases involve governance, royalty rights, personalized engagements with customers and opportunities to upsell and cross sell more efficiently. Besides using data to improve QoS, telecom operators monetize IoT data from different enterprises to unlock revenue opportunities.

Adoption of cloud, SDN, AI and machine learning technologies improves agility.

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Provider Positioning

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	Communications Business Services	Communications Next-gen IT Services	Media Business Services	Media Next-gen IT Services
Accenture	Leader	Leader	Leader	Leader
Atos	Not In	Contender	Not In	Contender
Birlasoft	Not In	Contender	Not In	Contender
Capgemini	Product Challenger	Leader	Product Challenger	Leader
Cognizant	Product Challenger	Product Challenger	Product Challenger	Product Challenger
DXC	Not In	Contender	Not In	Contender
EPAM	Not In	Contender	Not In	Not In
Genpact	Product Challenger	Not In	Leader	Not In
HCL	Leader	Leader	Leader	Leader
Infosys	Product Challenger	Product Challenger	Product Challenger	Product Challenger
LTI	Not In	Not In	Not In	Contender

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Provider Positioning

Page 2 of 2

	Communications Business Services	Communications Next-gen IT Services	Media Business Services	Media Next-gen IT Services
Persistent	Contender	Contender	Contender	Contender
TCS	Leader	Leader	Leader	Leader
Tech Mahindra	Leader	Leader	Product Challenger	Rising Star ★
Virtusa	Contender	Contender	Contender	Contender
Wipro	Product Challenger	Rising Star ★	Product Challenger	Leader
WNS	Product Challenger	Not In	Not In	Not In
EXL	Not In	Not In	Product Challenger	Not In
Teleperformance	Market Challenger	Not In	Market Challenger	Not In
Sutherland	Leader	Not In	Leader	Not In
Exela Technologies	Not In	Not In	Contender	Not In

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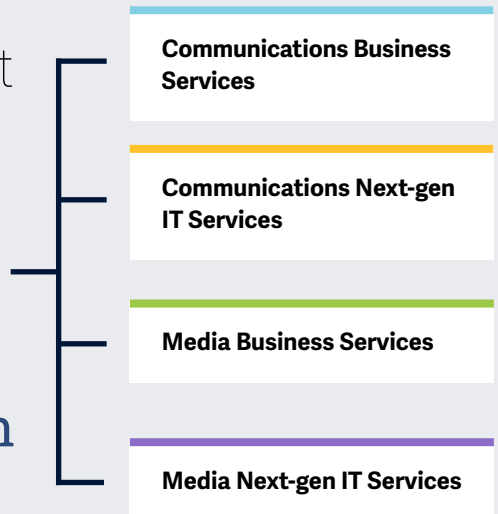
This study focuses on what ISG perceives as most critical in 2022 for **Media and Communication Services**



Simplified Illustration Source: ISG 2022

Definition

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

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

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

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

A key challenge faced across industries is the requirement to re-engineer the underlying networks to better optimize their performance against a greater network load. Enterprises seek service providers that

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can provide IT outsourcing services that address the challenges posed by the legacy network infrastructure and help alleviate network upgrade issues. Key services such as network provisioning; orchestration and automation; cloud migration and automation; and application management, including API integration and workflow automation, will be in demand in the future, as media and communication service providers build an infrastructure that is seamlessly connected and improves the degree of innovation.

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

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

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

Specific takeaways for IT decision-makers include:

- A differentiated positioning of service providers based on competitive strengths and portfolio attractiveness
- A perspective on the U.S. market

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

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Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following four quadrants on Communications Business, Communications Next-gen IT, Communications Business Services, Media Business Services and Media 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
- Focus on regional market

Our study serves as the basis for important decision-making in terms of 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 service providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT 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, and the corporate structures of customers, and positions IT 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 US$20 million and US$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 US$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 Challenger, Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens quadrant may include a service provider(s) that 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).

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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.

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Communications Business Services

Who Should Read This

This report is relevant to CSPs in the U.S. for evaluating business process services (BPS) providers.

In this quadrant report, ISG highlights the current market positioning of providers offering business services to CSPs in the U.S., and how each provider addresses the key challenges faced in the region.

Post pandemic, CSPs realized the need for combining core business process management (BPM) services with advanced technologies to increase efficiency. As a result, service providers are investing in improving analytics capabilities and accelerating supply chain transformation. CSPs across the U.S. are shifting their traditional business models from being network-provider-centric to content-provider-centric. They partner with business service providers to improve their capabilities in various functional areas such as call center transformation, analytics and reporting, order processing, account management and service management.

ISG observes that CSPs want to streamline and optimize their business observations to minimize costs using intelligent operation services. With increased use of chatbots, RPA and low-code/no-code applications among the operations team, AI and automation have become important enablers in automating business processes.

Marketing and sales leaders should read this report to understand the relative positioning and capabilities of service providers that can help them build and manage complex business management to improve their business data analysis and decision-making.

Sourcing, procurement and vendor management professionals should read this report to gain understanding of the current landscape of communication business service providers in the U.S.

Operational and finance leaders should read this report to understand the relative positioning of service providers, and thus, engage with the right partner that can ensure high returns on investment and improve business performance.

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ISG Provider Lens™

Source: ISG RESEARCH

Media and Communication Services
Communications Business Services

U.S. 2022

This quadrant assesses service providers that offer business process services to **communication service providers (CSPs)**. Business process services are typically used to **digitize customer engagement** services from the **backend to the frontend of their businesses**.

Rohan Thomas

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Definition

This quadrant assesses providers that offer BPO services to clients from the communication industry and are keen on outsourcing their operations from the backend to the frontend of their businesses. Incorporated with AI, machine learning and analytics, BPO services are used by communication service providers to not only enhance the operational efficiency, but also to derive customer-centric data that is used to enhance customer experience or improve their opportunity to upsell and cross-sell. In addition to data collation and insights generation, BPO services include customer engagement services such as call center, dynamic FAQ and chatbots.

Eligibility Criteria

1. Ability to offer a **combination of services used for customer-centric** functions such as order processing, account management, service management, billing/invoicing, call center, dynamic FAQ, chatbot technology and relationship management
2. **Dedicated FTEs** that are trained/certified in areas such as cybersecurity, process mining, AI, machine learning and data sciences
3. Demonstrate **AI and analytics capabilities and integration with business processes** specific to the communications industry
4. Ability to provide ERP and **CRM tools** to clients from the communications industry
5. Ability to offer referenceable **case studies** for business services across the communications industry

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Observations

The telecommunications industry experiences low revenue margins and ARPUs and high levels of customer churn. This was exacerbated by the COVID-19 pandemic. That is because as many employees worked from home, the network infrastructure experienced significant levels of data surge. The infrastructure was unable to scale efficiently and, hence, the CSPs could not guarantee a high degree of quality of service and experience to customers.

Communications services providers are, therefore, trying to enhance and personalize customer experience. With the complexity of the network infrastructure, well-established CSPs face challenges in digitally transforming themselves without significant incursion of cost. Therefore, they seek business process service providers that can offer templatized and end-to-end transformative services.

The implementation of AI, machine learning and powerful data analysis is key for these transformative services. End users prefer service providers that can help them leverage AIOps, cognitive intelligence and RPA to automate their operations support systems and business support systems. The need to automate the OSS/BSS is increased with the CSPs diversifying their services to include IoT and payment gateways. At the frontend, service providers are implementing chatbot technologies, dynamic FAQs and virtual assistant to quickly resolve customer queries.

Service providers that can offer a differentiated, data-driven, and intelligent platform therefore have a higher probability to succeed in the market.

From the 35 companies assessed for this study, 15 have qualified for this quadrant with five being Leaders.

accenture

Accenture provides business process services primarily to large CSPs. The company has strong AI and data science capabilities, which were further enhanced through the acquisitions of companies such as BRIDGEi2i and Cloudworks. Its Digital Omni Channel Platform (DOCP) helps the operator optimize its go-to-market strategy.

HCL

HCL's chatbot technology solutions Clara and Lucy are used by CSPs to improve customer service and speed of resolution. Acquired from IBM, Workload Automation, together with NetBot, significantly improves orchestration across multiple network environments. HCL also offers solutions that accelerate SAP implementation.

Sutherland

Sutherland partners with Google, Microsoft and Amazon to co-develop its AI- and data-driven platforms. Leveraged by large CSPs, the company's solutions help them achieve a substantial turnaround in their key performance indices by automating important business support functions.

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TCS's patented products such as MFDM™, Cognix™ and CNOPS™ help improve business and network automation. Backed by a large, certified FTE base, which possesses strong telco expertise, the company can deliver strategic solutions that are specific to the needs of the CSPs.

Tech Mahindra has more than 10 platforms that are used by CSPs to enhance automation across different business areas. Products such as CareXa and SOCIO are used by its clients to automate and improve customer engagement without significantly increasing OpEx.

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Communications Next Gen IT Services

Who Should Read This

This report is relevant to communication service providers (CSPs) in the U.S. for evaluating next-gen IT services providers.

In this quadrant report, ISG highlights the current market positioning of providers offering next-gen IT services to CSPs in the U.S., and how each provider addresses the key challenges faced in the region.

In the last few years, CSPs across the U.S. increasingly have been focusing on developing industrial use cases for 5G connectivity, as well as private networks. However, the current deployment is based on the existing infrastructure, and CSPs must invest heavily to avail the potential of 5G technology. Service providers across the U.S. are offering a plethora of services to support the 5G evolution.

Artificial intelligence adoption has also gained significant traction across the industry. CSPs are exploring new ways to embed AI and machine learning algorithms to enhance automation of their networks. Service providers have increased their investment in AIOps capabilities, which helps ensure IT landscape uptime to self-heal incidents by leveraging automation and AI.

ISG has also observed an increase in demand for AR/VR/XR services based on smart solutions and digital factories. To help telcos in this domain, service providers are investing in capabilities such as SDN and telco cloud, while also improving partnerships with telecommunication standard development organizations (SDOs).

Communication technology leaders should read this report to understand the relative positioning of service providers and how they compete in the telecom market in terms of their differentiated offerings, innovations, talent and portfolios.

Digital transformation and IT professionals should read this report to understand how providers of next-gen IT services in the telecom industry can aid them with their initiatives, and how these providers compare with one another.

Communication enterprise CIOs should read this report to understand providers' relative positioning and capabilities. It can help them effectively plan and select the right service provider.

Sourcing, procurement and vendor management professionals should read this report to gain understanding of the current landscape of next-gen IT service providers in the U.S.

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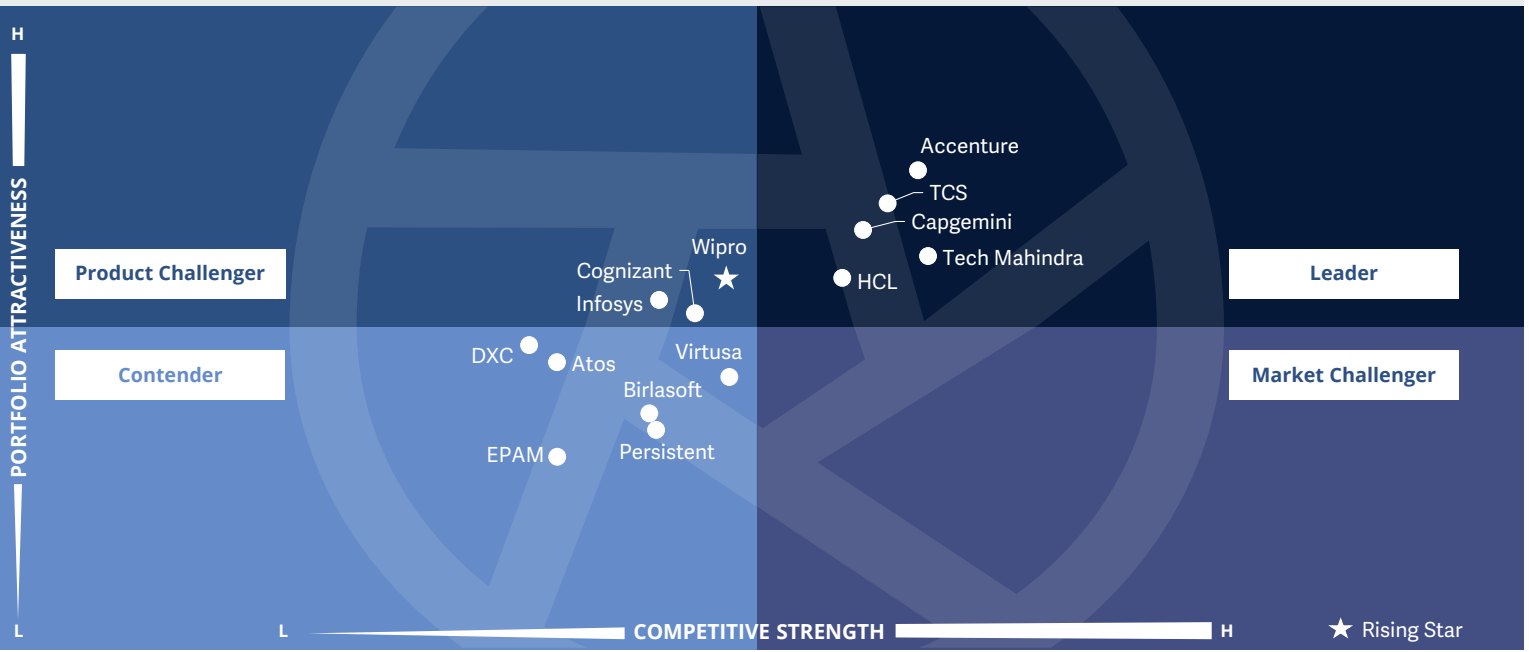
ISG Provider Lens™

Source: ISG RESEARCH

Media and Communication Services
Communications Next-gen IT Services

U.S. 2022



This quadrant assesses service providers that offer **IT outsourcing services** to **CSPs**. IT outsourcing services typically involve data center **transformation and cloud migration** and **application development and testing**.

Rohan Thomas

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Definition

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

Eligibility Criteria

1. Ability to offer a combination of **IT outsourcing services** such as network management, application management, OSS/BSS support and cloud management to clients from the communication industry
2. Demonstrate extensive expertise in areas such as 5G services, SDN, NFV, vRAN and SD-RAN Demonstrate **strategic partnerships with hyperscalers** such as AWS, Google Cloud and Microsoft Azure to help clients implement the telco cloud
3. Demonstrate partnerships and integration capabilities with **telco OEMs** such as Aviat, Cisco, Ericsson and Huawei
4. Ability to offer **cybersecurity services** such antivirus solutions, IAM and endpoint security to mitigate data theft
5. Ability to provide referenceable use cases that illustrate how **IT outsourcing services** improved the service quality and customer experience

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Observations

While CSPs in the U.S. are not actively pursuing 5G services as aggressively compared to those in other regions in the world, they are conducting tests and pilots for 5G private networks. Given the well-established nature of their network infrastructure in the region, the stagnation in their revenue growth and the low ARPUs realized, large and legacy CSPs are facing challenges in re-architecting their networks to expand their service offerings.

To mitigate this, service providers should provide solutions that can transform CSPs' infrastructure without significantly increasing costs. Given the agility with which CSPs need to operate, well-established service providers in the country must be able to provide an effective cloud migration strategy to their end users.

As many CSPs continue to migrate to the public cloud, they seek service providers that not only have well-trained, cloud-certified FTEs, but also strong partnerships with major hyperscalers. To alleviate interoperability issues, which may arise when operating in a multivendor environment, well-established service providers participate in standards development organizations (SDOs) to create an open-source, network ecosystem.

CSPs focus on adopting SDN and network functions virtualization (NFV) technologies to improve telecom agility. Service providers that have many partnerships with established network equipment manufacturers (NEMs) are in a better position to assist the CSPs in adopting these technologies.

From the 35 companies assessed for this study, 14 have qualified for this quadrant with five being Leaders and one Rising Star.

accenture

Accenture has top-tier partnership with leading hyperscalers such as AWS, Google Cloud and Azure. The company has an extensive ecosystem of NEMs and specialists, which helps its end users transition to next-generation network infrastructure. Accenture also contributes extensively to telecom standardization via SDOs.

Capgemini

Capgemini has strong edge compute capabilities. Its Ensconce platform is used by CSPs to deploy low-latency 5G applications near the edge. The company also engages with several well-established NEMs and has a significant cloud transformation strategy.

HCL

HCL has strong partnerships with leading hyperscalers and has invested heavily in FinOps. It has significant SDN capabilities, which include SD-WAN, NaaS and distributed edge. HCL's Augmented Network Automation (ANA) platform self-optimizes complex network infrastructure.

TCS TATA CONSULTANCY SERVICES

TCS uses several accelerators to help its end-users optimize their migration to the telco cloud. Its partnerships with key NEMs help the company integrate its SDN and NFV capabilities into the infrastructure operated by the CSP.

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Tech Mahindra has significant reach in the communications industry and is ranked as a Leader in the competitive strength index. The company's intelligent services cover a broad range of use cases. With a large skilled FTE base, Tech Mahindra's 5G Labs acts as the center for innovation for many CSPs.

Wipro has an extensive portfolio of products designed to meet the SDN requirements of CSPs. The company also has a broad portfolio of engineering solutions, ranging from the network core to the edge. Combined with innovative AI capabilities, Wipro experiences robust growth among CSPs.

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Media Business Services

Who Should Read This

This report is relevant to media enterprises in the U.S. for evaluating business process services (BPS) providers.

In this quadrant report, ISG highlights the current market positioning of providers offering BPS to media enterprises in the U.S. and how each provider addresses the key challenges faced in the region.

In the post-pandemic era, media enterprises are witnessing the acceleration of digital technologies in the BPS space. Outsourcing clients are increasingly demanding some element of digital technology in core transformation services such as finance transformation, supply chain and media inventory optimization, marketing, and trust and safety to increase efficacy.

ISG observes that analytics has become a key priority across the media and entertainment industry, and companies are using it as a key enabler in planning content investment and strategy, scheduling intelligent content and increasing customer engagement.

Media enterprises are looking for various ways to embed automation in the media value chain, and providers in this space are addressing this with the help of next-gen AI, machine learning and computer vision techniques. ISG predicts that the use of blockchain in media service lines such as contract automation will gain traction in the coming years.

Marketing and sales leaders should read this report to understand the relative positioning and capabilities of service providers that can help them build and manage complex business management systems to improve their business data analysis and decision-making.

Sourcing, procurement and vendor management professionals should read this report to gain understanding of the current landscape of media business service providers in the U.S.

Operational and finance leaders should read this report to understand the relative positioning of service providers, and thus, engage with the right partner that can ensure high returns on investment and help improve business performance.

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ISG Provider Lens™

Source: ISG RESEARCH

Media and Communication Services
Media Business Services

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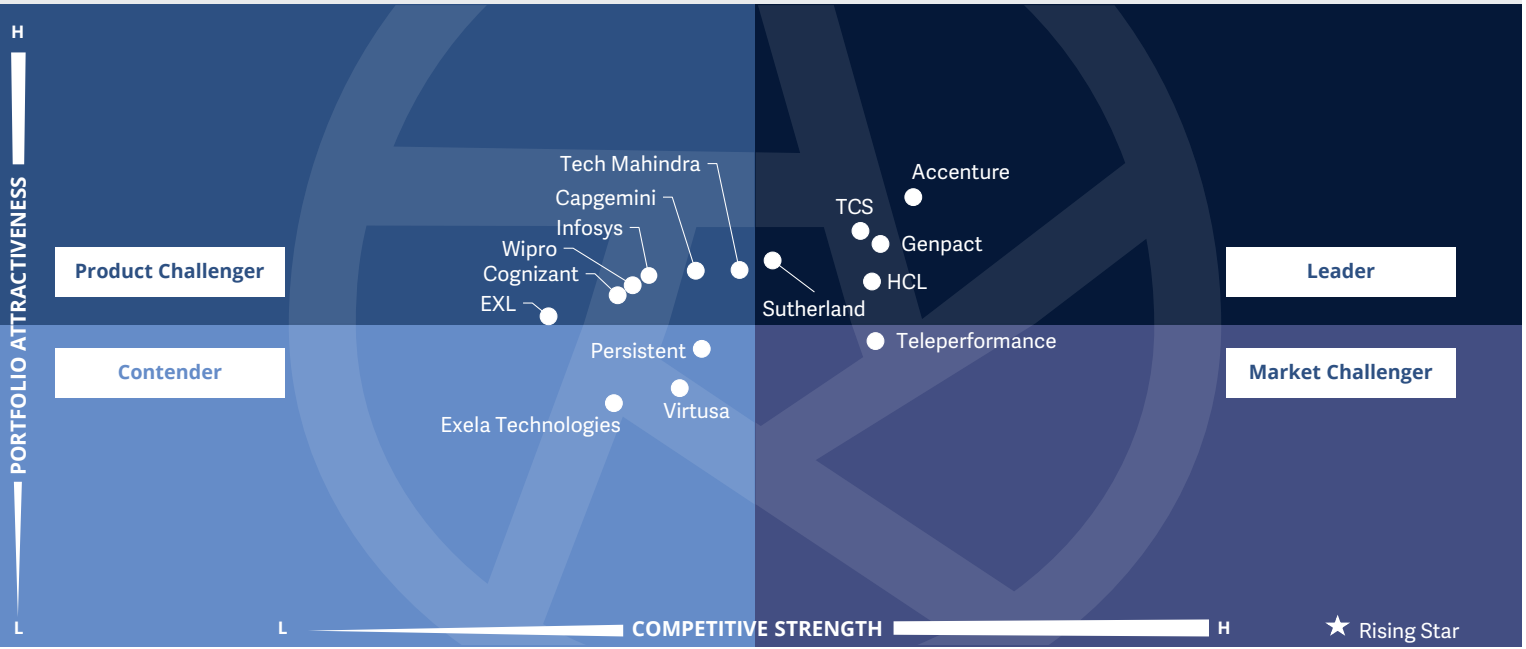

This quadrant assesses service providers that offer business process services to **end users from the media vertical**. Business process services are typically used to **digitize customer engagement** services and business functions specific to the **media industry**.

Rohan Thomas

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Definition

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

Eligibility Criteria

1. **Ability to offer a combination of services,** which include different backend and frontend customer services, sales and marketing, royalty and rights management, and content lifecycle management
2. **Dedicated FTEs** that are technically trained or certified in areas such as cybersecurity, process mining, AI, machine learning and data sciences; legal expertise is also preferred
3. Demonstrate **AI, analytics and blockchain integration** capabilities with business processes across the media industry
4. Ability to **leverage ERP and CRM tooling vendors** and provide services to clients
5. Offer referenceable case studies for various services across the value chain

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Observations

The media industry in the U.S. is experiencing some degree of consolidation due to several mergers and acquisitions. Consequently, supply chains and content distribution networks are becoming more complex.

With the emergence of the direct-to-consumer model driven by a vibrant creator economy, the industry, which now comprises a broad spectrum of small, midsize and large enterprises, requires innovative solutions that are scalable across traditional and social media accounts. These solutions help analyze the consumption of content from the customer's perspective. Due to the crossover of content consumption across different platforms, clients also require a cost-effective policy governance solution that has a high degree of interoperability across multivendor platforms. Service providers are improving their AI capabilities through partnerships, acquisitions or organically, to help enterprises automate workflows across the complicated supply chains and improve other business areas such as royalty rights management and sales automation.

Service providers are optimistic about blockchain and the implications it could have on many media industry service lines. While some service providers have an offering that is based on blockchain, others are actively examining how they can most efficiently leverage the technology.

Service providers' ERP partnerships, particularly with SAP, are now more important than before, as end users migrate from legacy environments to enhance the agility of their systems.

From the 35 companies assessed for this study, 15 have qualified for this quadrant with five being Leaders.

accenture

Accenture offers a broad range of business transformation solutions to its clients in the media industry. Backed by strong AI and analytics capabilities, these solutions aim at providing a seamless experience to end users. The company has acquired several companies to strengthen its capabilities further.

Genpact's business services portfolio covers finance operations, content modernization, media analytics and royalty rights management. Cora plays an important role in many of its business operations. It is an AI-based digital platform integrated with accelerators such as NLP, computer vision, conversational AI and deep learning.

HCL

HCL's business process services are leveraged by end users to automate and transform business operations across a broad range of business functions, including content acquisition, subscriber management and advertising management. Its DRYiCE™ delivers strong implementations of AI and machine learning for media companies to enable them to operate leaner and faster.

Sutherland

Sutherland partners and co-develops AI capabilities with Amazon, Microsoft and Google. The company offers a range of AI and data-driven solutions that help large media companies augment different systems and supply chains.

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TCS offers a range of solutions that are integrated with AI, machine learning, analytics and cloud capabilities and are specific to the needs of enterprises in the media industry. TCS COIN enables blockchain technology to be applied in various business areas within the media industry. The company has strong expertise in SAP migration.

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Leader

"Genpact provides data- and analytics-led transformation in ad operations, finance, and procurement."

Rohan Thomas

Genpact

Overview

Genpact (UK) Limited is a subsidiary of Genpact Limited, a publicly-traded company listed on the New York Stock Exchange. It operates in 30 countries and has more than 1,00,000 employees in 90 offices. In FY21, Genpact generated $4 billion (+8.4 percent YoY) in revenue. Genpact's portfolio of services covers finance operations, content modernization and distribution, media trust and safety, media analytics and AI. It served more than 25 large media and entertainment clients in 2021.

Strengths

Extensive media service capabilities: Genpact's Media Business services capabilities encompass digital transformation of finance and accounting operations, enterprise-wide automation led by data and analytics, customer care/contact center modernization and optimization, sales and marketing operations support, strategic sourcing and supply chain optimization, trust and safety for content management and moderation, and royalty rights management solutions. Genpact also offers capabilities to handle different media services and processes, including acquisitions, sales automation, chatbot technology and content lifecycle management.

Strong AI capabilities: Genpact offers the above services through its industry-leading digital transformation platform known as Cora. This integrated solution is built with a modular set of services and an open API architecture that connects to leading cloud, AI and automation services. It achieves significant improvement in agility and governance with the help of accelerators such as natural language processing (NLP), conversational AI, computer vision and deep learning.

Caution

Genpact needs to have more expertise in blockchain. The company must focus on innovating in this area and find ways to integrate the technology into its services, especially royalty rights management.

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Media Next Gen IT Services

Who Should Read This

This report is relevant to media enterprises in the U.S. that are evaluating providers of next-gen IT services.

In this quadrant report, ISG highlights the current market positioning of providers offering next-gen IT services to media enterprises in the U.S. and how they address the key challenges faced in the region.

With the evolution of social media and OTT platforms, media companies are embarking on a digital-first journey to stay competitive in the market. ISG observed that cloud migration acts as an enabler for digital transformation and enhanced innovation. Content monetization continues to be important for media enterprises. They are deploying data analytics algorithms to increase viewer engagement and personalization.

Moreover, customers across the U.S. are demanding quality streaming experience. To address this demand, providers are planning to embed 5G connectivity into their processes to drive streaming transformation across the media and entertainment industry.

Developments in advanced technologies such as AR/VR, IoT, AI, automation, analytics and blockchain are enabling media enterprises to meet the changing business requirements.

Some of the leading enterprises in the media industry have also started their journey toward metaverse and are seeing increased traction among consumers.

Media technology leaders should read this report to understand the relative positioning of service providers and how they compete in the media's next-gen IT market in terms of their differentiated offerings, innovations, talent and portfolios.

Digital transformation and IT professionals should read this report to understand how providers of next-gen IT services in the media industry can aid them with their initiatives, and how these providers compare with one another.

Media enterprise CIOs should read this report to understand providers' relative positioning and capabilities. It can help them effectively plan and select the right service provider.

Sourcing, procurement and vendor management professionals should read this report to gain understanding of the current landscape of media next-gen IT service providers in the U.S.

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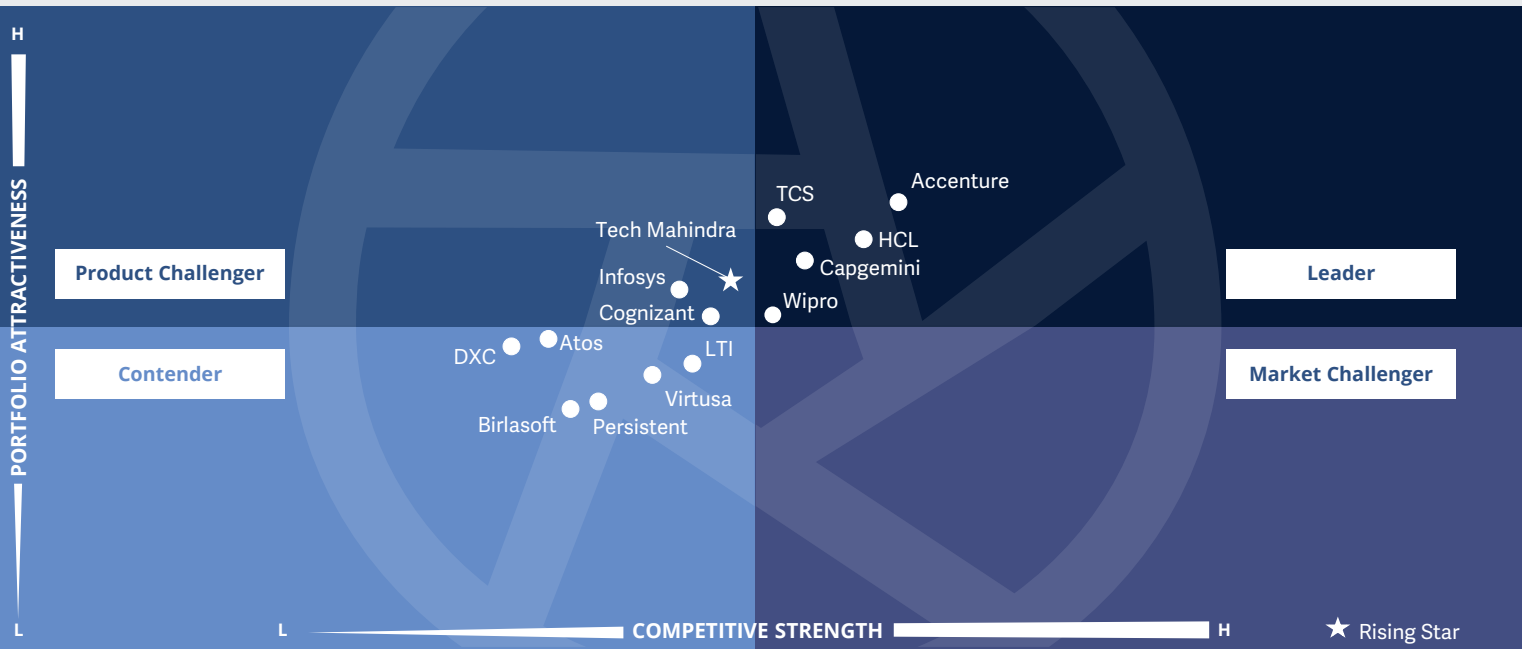
ISG Provider Lens™

Source: ISG RESEARCH

Media and Communication Services
Media Next-gen IT Services

U.S. 2022



This quadrant assesses service providers that offer **IT outsourcing services** to **end users in the media industry**. IT outsourcing services typically involve **data center transformation and cloud migration** and **application development and testing**.

Rohan Thomas

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Definition

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

Eligibility Criteria

1. **Ability to offer a combination of IT outsourcing services**, which include CDN and edge computing, application management and cloud enablement
2. Extensive **domain expertise** in areas such as SDN, MFV/NFV, SD-WAN and others
3. Demonstrate **strategic partnerships with hyperscalers** such as AWS, Google Cloud, Microsoft Azure and others to help clients implement the cloud
4. Ability to offer **cybersecurity services** such as antivirus solutions, IAM and endpoint security to mitigate data theft
5. Ability to offer referenceable case studies that illustrate how IT outsourcing services improved the service quality and customer experience

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Observations

The COVID-19 pandemic and the resulting lockdown led to a significant rise in OTT services. As this segment continues to evolve, traditional media companies are unable to stay apace in terms of innovation in the OTT segment. This has forced many companies to migrate to an infrastructure that is more scalable and agile than the legacy infrastructure. Because of their well-established, legacy network infrastructures, stagnant customer bases and diminishing revenue margins, large media companies face challenges in transitioning when compared to new companies that already have a significant amount of their workload migrated to the cloud.

Therefore, the demand for cost-efficient solutions that can optimize the cloud journey is increasing. Service providers have partnered with and built cloud competencies with key hyperscalers such as AWS, Google Cloud and Microsoft Azure to help end users in the industry in their migration journey.

To improve content innovation and distribute low-latency content, end users would also need to re-architect their infrastructure to a decentralized one and implement SDN to enhance agility. Therefore, they prefer service providers that, in addition to strong cloud transformation, have strong partnerships with established network equipment manufacturers (NEM) and can offer a differentiated SDN and edge capabilities to substantially transform and optimize the performance of the infrastructure.

From the 35 companies assessed for this study, 14 have qualified for this quadrant with five being Leaders and one Rising Star.

accenture

Accenture has several competency certifications with top-tier hyperscalers. It has an extensive partnership ecosystem, enabling its services to be easily integrated with legacy and digital media operations. With several acquisitions, the company has enhanced its capabilities, particularly in cloud and edge technologies.

Capgemini

Capgemini provides an end-to-end, cloud-native content management and automation platform. Its endpoint security as a service (EPaaS) is one of many security solutions that proactively monitors and neutralizes advanced threats. Capgemini's edge compute platform, Ensconce, helps end users deploy multiaccess edge solutions.

HCL

HCL has established business ecosystem units with key hyperscalers such as AWS, Microsoft Azure and Google Cloud. Its partnerships with key network vendors enable it to further innovate on SDN technologies and edge computing.

TCS TATA CONSULTANCY SERVICES

TCS's Machine First Delivery Model™ (MFDM) and Ignio are integral to its AI and analytics capabilities. In addition to its cloud practice and AI abilities, the company also architects and implements content provisioning and distribution solutions.

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Wipro has filed several patents in AI and machine learning. These technologies are used by end users to enrich and moderate content. The company has also secured several cloud competencies with a large pool of cloud-certified professionals based in the U.S.

Tech Mahindra (Rising Star) will experience significant growth in the coming years. Key reasons for this growth are its metaverse solutions and extensive range of business transformation services offered to customers in the media industry.

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Appendix

Methodology & Team

The ISG Provider Lens™ 2022 – Media and Communication Services analyzes the relevant software vendors/service providers in the U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Lead Author:
Rohan Thomas

Editors:
Sajina B and John Burnell

Research Analyst:
Riya Munjal

Data Analyst:
Sumit Kumar

Consultant Advisor:
Jeff Cosby

Project Manager:
Shona Merin Jacob

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The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of October 2022, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

The study was divided into the following steps:

1. Definition of Media and Communication Services market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
   * Strategy & vision
   * Tech Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * CX and Recommendation

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Lead Author

Rohan Thomas
Senior Lead Analyst

Rohan Thomas has nearly a decade's worth of knowledge expertise in realms of ICT, which include telecommunications, data centers, networks and application performance management. At ISG, Rohan is the lead analyst for ISG Provider Lens™, leading research activities and benchmarking exercises pertaining to the regional adoption of digital infrastructure such as private/hybrid cloud.

He has a bachelor's degree in mechanical engineering from Visveswaraya Technological University and a master's degree in computer aided design and manufacturing from Vellore Institute of Technology.

Research Analyst

Riya Munjal
Senior Research Analyst

Riya Munjal is a senior research analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on media, communications, retail and consumer packaged goods industries. She supports the lead analysts in the research process and co-authors the global summary report with market trends and insights.

Riya also develops content from an enterprise perspective. Riya has helmed this role since 2021. Prior to this role, she worked in market and industry research on go-to-market strategies, account intelligence, and benchmarking studies. Her area of expertise includes AI, AR/VR and analytics.

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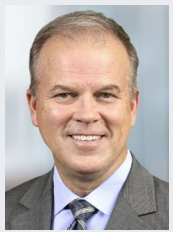
IPL Product Owner



Jan Erik Aase

Partner and Global Head – ISG Provider Lens™

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.

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ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens research, please visit this webpage.

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ISG

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