

# Industry Insights – Telecom and Network

May 2022 : Complimentary Abstract / Table of Contents



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For more information on this and other research published by Everest Group, please contact us:

**Hrishi Raj Agarwalla**, Practice Director

**Parul Jain**, Practice Director

**Azaan Nazer**, Senior Analyst

**Shivani Mudgil**, Manager

**Anushka Kochar**, Senior Information Specialist

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# Introduction

## Background of the research

The report provides fact-based data and analysis on key trends and developments in global outsourcing for the telecom and network industry. The report captures key developments across offshore and nearshore locations leveraged for service delivery, offshore and nearshore penetration and sourcing mix, global sourcing maturity, and adoption of digital services in the telecom and network industry. It also presents opportunities, implications, and challenges for providers and enterprises in the next normal.

## The scope and methodology of this report includes:

- Key global sourcing trends in the telecom industry
- Value chain processes in the telecom industry
- Leading offshore locations leveraged for service delivery
- Offshore penetration and sourcing mix across key functions, including telecom operations, corporate functions (F&A, HR, and procurement), and digital services such as analytics, automation, Artificial Intelligence (AI) / Machine Learning (ML), cloud, Internet of Things (IoT), and blockchain
- Global sourcing maturity across key functions – telecom operations, IT services, corporate functions, and digital functions
- Adoption of digital services (analytics, automation, AI/ML, cloud, IoT, and cybersecurity) in telecom
- The talent war and mitigation measures

## Scope of this report



**Geography**  
Global



**Industry**  
Telecom and network industry

## Overview of the telecom industry



- Global Business Services (GBS) organizations have been at the forefront of innovation and Research and Development (R&D) for telecom companies, aiding in strategic development. Other than delivering high maturity telecom operations, delivery of next-generation technology services has gained more focus in recent years with the changing telecom industry landscape
- Telecom enterprises are increasingly investing in transformation through digital products and platforms. Digital technologies such as Artificial Intelligence (AI) / Machine Learning (ML), cloud, blockchain, cybersecurity, IoT, mobility, and data analytics are redefining the overall telecom industry landscape
- The current macroeconomic situation in Europe and an all-time high industry attrition have acted as accelerators for adopting digital capabilities to streamline processes, invest in 5G, and increase focus on cybersecurity. These new focus areas present an opportunity for telecom GBS organizations and service providers to establish themselves and deliver more value-added capabilities
  - GBS centers are being increasingly leveraged by telecom enterprises for network operations, innovation, R&D, customer center support, and digital capabilities including IoT, analytics, cloud, and AI
- Enterprises must adopt talent retention initiatives, enhanced network operations delivery, multi-geography penetration, regulatory compliance measures, supply-side demand mitigation efforts, and a combination of next-generation technology capabilities to overcome key business challenges



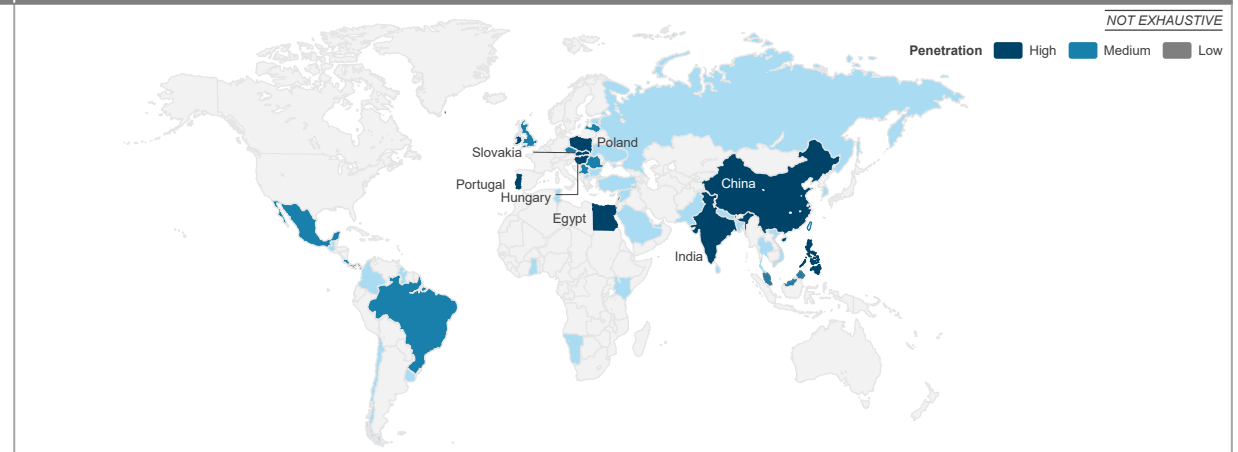
- This report focuses on the global sourcing adoption (of both GBS centers and third-party service providers) by leading technology firms
- Examples of key market participants:
  - Telecom enterprises – Amazon, Dell, Facebook, Google, HP, Huawei, Intuit, Microsoft, Oracle, Samsung, SAP, and Uber
  - Global service providers supporting the telecom industry – Accenture, Cognizant, HCL, IBM, Infosys, Tech Mahindra, TCS, and Wipro
  - Other specialist service providers supporting the telecom industry – AnChain.AI, KoreConX, Minsait, and Viking Analytics

# This study offers six distinct chapters providing a deep dive into key aspects of life sciences market; below are four charts to illustrate the depth of the report

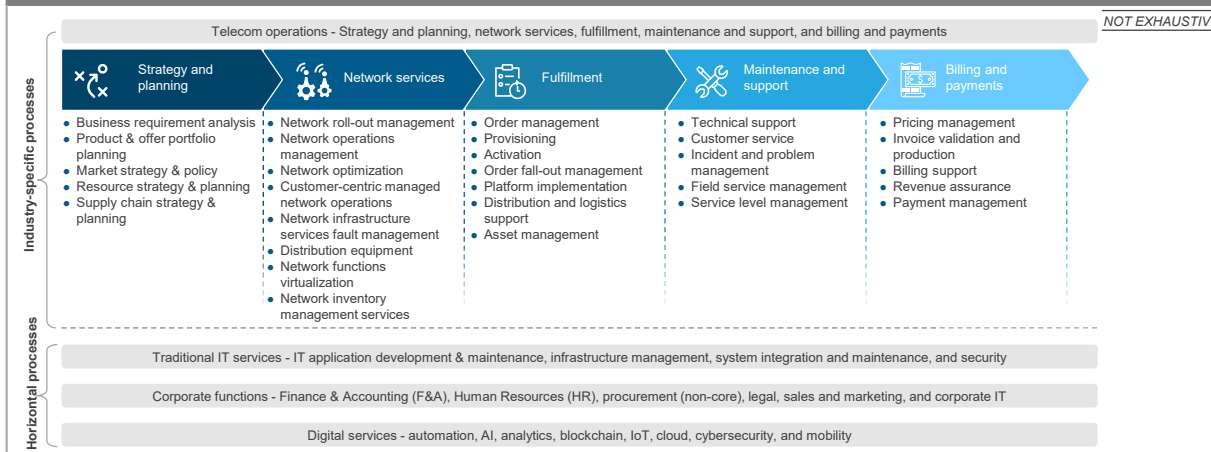
## Key trends for global sourcing in life sciences



## Leading offshore locations leveraged by life sciences firms



## Key value-chain process in telecom and network industry



## Framework to assess global sourcing maturity across functions

Factors	Dimensions of assessment	Assessment rating – how to interpret		
		Low maturity	Medium maturity	High maturity
Nature of work	Mix of rule-based vs. complex / judgment-oriented work	Predominantly rule-based work supported	Both rule-based and complex work supported, with a skew toward rule-based work	Both rule-based and complex work supported, with a skew toward complex work
Average scale of operations for global / regional work	Size of teams handling the function	Evidence of small-scale centers (<100 FTEs per function for leading players) supporting global/regional operations	Evidence of medium-scale centers (100-200 FTEs per function for leading players) supporting global/regional operations	Evidence of large-scale center (200+ FTEs per function for leading players) supporting global/regional operations
Number of key players supporting global / regional work	Number of leading players leveraging back-office for the function (supporting global / regional work)	No/limited companies supporting the function	Some companies (four to six) supporting the function	Multiple companies (seven to ten) supporting the function
Level of ownership	Degree of independence / end-to-end execution of a process	No independence in carrying out a process	Provides some level of independence in executing a process	End-to-end execution of a process

# Research calendar

## Market Vista™

■ Published
 ■ Planned
 ■ Current release

Reports title	Release date
Market Vista™: Q2 2021	May 2021
Market Vista™: Industry Insights – Technology	July 2021
Market Vista™: Q3 2021	August 2021
Market Vista™: Industry Insights – Insurance	November 2021
Market Vista™: Q4 2021	December 2021
Market Vista™: Industry Insights – Banking	December 2021
Trump Cards: Driving Healthcare Innovation During Uncertainty	December 2021
It Is Not a Talent War; It Is a New Reality – 2022 Key Issues in Global Sourcing	February 2022
Market Vista™: Q1 2022	February 2022
It Is Not a Talent War; It Is a New Reality – 2022 Key Issues in Global Sourcing – Service Provider Perspective	March 2022
Market Vista™: 2021 Year in Review and Outlook for 2022	March 2022
<b>Market Vista™: Industry Insights – Telecom and Network</b>	<b>May 2022</b>
Market Vista™: Q2 2022	Q2 2022
Market Vista™: Q3 2022	Q3 2022
Market Vista™: Industry Insights – Healthcare	Q3 2022

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### Dallas (Headquarters)

[info@everestgrp.com](mailto:info@everestgrp.com)

+1-214-451-3000

### Bangalore

[india@everestgrp.com](mailto:india@everestgrp.com)

+91-80-61463500

### Delhi

[india@everestgrp.com](mailto:india@everestgrp.com)

+91-124-496-1000

### London

[unitedkingdom@everestgrp.com](mailto:unitedkingdom@everestgrp.com)

+44-207-129-1318

### Toronto

[canada@everestgrp.com](mailto:canada@everestgrp.com)

+1-647-557-3475

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