The B2B pulse

Top six expectations of telecom's business customers

Capgemini RESEARCH INSTITUTE

#GetTheFutureYouWant

Table of contents

Executive summary

This is our first edition of the B2B pulse for the telecom industry, an annual study analyzing the evolving needs, challenges, and experiences of business customers (hereafter, referred to as organizations) across various industries. This report explores the pain points these organizations face with the telecom services and identifies six areas of improvement to help telecom providers enhance service delivery and drive business value. To understand these, we surveyed executives from 1,000 organizations across 11 sectors and 13 countries. We further conducted twenty in-depth interviews with executives from the telecom industry and the customer industries. With widespread digital transformation, the telecom sector has the opportunity to evolve from its traditional role as trusted service provider to become a strategic partner to its business customers. To transition successfully, the telecom sector must understand and align itself with the trajectories of its clients, their needs, and evolving ecosystem partners.

1. **Solution-centricity:** Around three in five organizations expect telecom providers to better understand their markets and needs, while 67% of organizations want the telecom providers to offer the most effective solution. To illustrate, there is a stark gap between the percentage of organizations that prioritize compliance with service level agreements (SLAs) and network performance and reliability with more than seven in ten saying these are a priority, and the percentage of those that express satisfaction with these two aspects, which is only around one in three. Further, more than half of organizations would be willing to pay a premium for customized services.

2. **Simplification:** Organizations expect simpler solutions along with more flexible purchasing and servicing experience, as confirmed by seven in ten organizations that responded to our survey. 51% of organizations feel that the telecom buying process is complex and providers should simplify the process while only 22% are satisfied with the lead times. This calls for digitalization of many aspects of the buying process, including order placement, service discovery, and even customer service.

Executive summary

3. **Collaboration:** With the proliferation of new technologies, organizations are increasingly seeking strategic partnerships with telecom service providers. As many as 62 percent of organizations also expect their telecom provider to bring industry expertise, and integrate IT and system support; that is, they want an orchestrated ecosystem of providers for their end-to-end solutions. Interestingly, two in five organizations are also looking at consolidating their current number of service providers.

4. **Innovation:** Our research also found that most organizations would like their telecom provider to serve as a key source of innovation. As organizations undergo digital transformation, they are looking to invest in advanced connectivity solutions such as enhanced 5G and end-to-end internet of things (IoT) services. In addition to network and connectivity solutions, organizations plan to invest in collaboration and productivity, unified communications, and managed cloud and analytics services. A significant proportion are also looking at telecom providers to procure these services, highlighting a major opportunity for value-added services.

5. **Cybersecurity:** Within the broader spectrum of telecom services, cybersecurity is a priority area for more than 70 percent of organizations. Moreover, they expect their telecom provider to ensure robust protection for their networks. Telecom providers have an opportunity to develop security offerings such as data security and fraud protection.

6. **Customer experience:** Only 27% of organizations say their telecom providers currently deliver exceptional CX, while half are ready to pay a premium to improve it, highlighting an area of improvement as well as an opportunity for the providers.

Executive summary

Recommendations for the telecom sector: To capitalize on the opportunity to attain the status of a strategic partner, telecom providers should consider taking the following steps:

- **Reimagine the portfolio and sales approach:** Shift to a solution-first approach with flexible pricing and AI-driven insights to address evolving customer needs.
- **Focus on industry-specific offerings:** Design industry-specific solutions and enable vertical integration to meet unique industry demands and stay competitive..
- **Embrace impactful ecosystem partnerships:** Collaborate through industry-specific alliances, open platforms, and co-innovation to enhance sectoral integration and competitiveness.
- **Keep CX at the heart of every action:** Deliver seamless omnichannel support, personalized interactions, and reliable services to boost ease of use, satisfaction, and loyalty.
- **Embed or invest in advanced technologies to solve clients' needs:** Harness technologies such as edge computing and 5G, virtualization and cloud-native architectures, generative AI and hyperautomation to provide scalable, fitting, time-critical solutions.
- **Prioritize operational excellence:** Automate processes, use data-driven decision-making, and upskill the workforce to enhance efficiency of operations and agility of customer response and service.
- **Build resilience and sustainability right from the onset:** Strengthen cybersecurity, adopt green technologies, and develop robust crisis management strategies to ensure reliability and sustainability.

Who should read this report and why?

This report is relevant to executives from the telecom sector, decision-makers, and leaders focusing on the B2B segment. Key personas who will find this report valuable include — heads of enterprise or B2B sales, product and portfolio managers, network and infrastructure leaders, and executives delivering CX and cybersecurity solutions. The report will also be relevant to enterprise IT, procurement, and digital transformation leaders across industries reliant on telecom solutions. Business customers are increasingly looking for more than just connectivity – they expect integrated, tailored solutions that address their unique business needs.

This report identifies the six key expectations of business customers, revealing trends, pain points, and opportunities for enhancing service offerings and customer satisfaction. Executives will gain insights into what customers value most, such as reliability, flexibility, and innovation, and learn about how they can be a partner in the digital transformation of their customers. This report offers a proactive approach, providing a clear picture of where customers' priorities lie and how telecom companies can better align their products and services to meet those demands. Armed with these insights, executives can make informed decisions on strategic investments, partnerships, and innovations, ensuring their companies remain at the forefront of the telecom sector.

01 Solution-centricity: Meeting the specific needs of business customers

Telecom providers offer advanced communication tools and infrastructure that enable organizations to operate across geographies. However, businesses are no longer just looking for providers of network infrastructure – they need strategic partners who understand their industry-specific challenges and can deliver solutions that enhance efficiency, productivity, and growth.

Telecom providers must be prepared to offer customized solutions such as high-bandwidth provision, secure communications, regulatory compliance, and remote work enablement. Customer expectations may also differ according to geography and different governments' regulatory regimes.

49%

Percentage of business customers that expect their telecom provider to offer industry-specific offerings tailored to their unique needs

Anna Kopp, Digital Director, Germany and Netherlands at Microsoft, says: *"Sometimes, we need specific local services that are unique to a region, which we cannot get without escalation. This often requires going through an RFP [request for proposal] process multiple times for special projects. It's all about prioritizing based on the specific demands and potential of each market."*

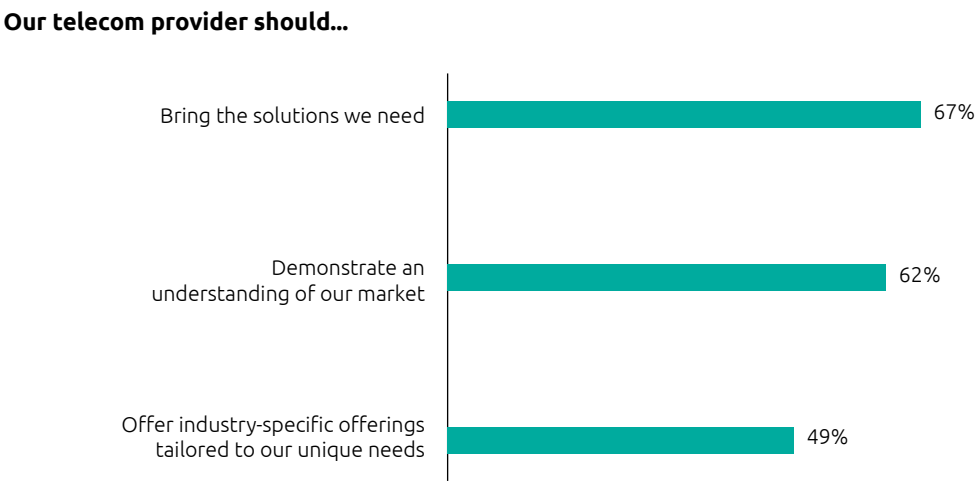
Our research reveals a significant shift in business customer expectations, with organizations now viewing telecom providers as strategic partners who must understand their industry needs and offer tailored solutions. Sixty-seven percent of organizations expect solutions that fit their needs rather than generic services. Additionally, 62% emphasize the need for telecom providers to demonstrate market understanding, highlighting the importance of industry-specific expertise.

Nearly 50% of organizations seek industry-tailored solutions, presenting a major opportunity for differentiation. One-size-fits-all connectivity and cloud services are no longer sufficient; businesses require solutions that integrate seamlessly into their workflows, such as ultra-low latency for financial services, secure networks for healthcare, and scalable IoT for manufacturing.

"Sometimes, we need specific local services that are unique to a region, which we cannot get without escalation. This often requires going through an RFP [request for proposal] process multiple times for special projects. It's all about prioritizing based on the specific demands and potential of each market."

Anna Kopp
Digital Director, Germany and Netherlands, Microsoft

Figure 1.
Business customers expect telecom providers to understand the market and bring the right solutions



Source: Capgemini Research Institute, Telco business customers survey, December 2024–January 2025, N = 1,000 organizations.

While organizations prioritize SLA compliance and network reliability, they show least satisfaction with these areas

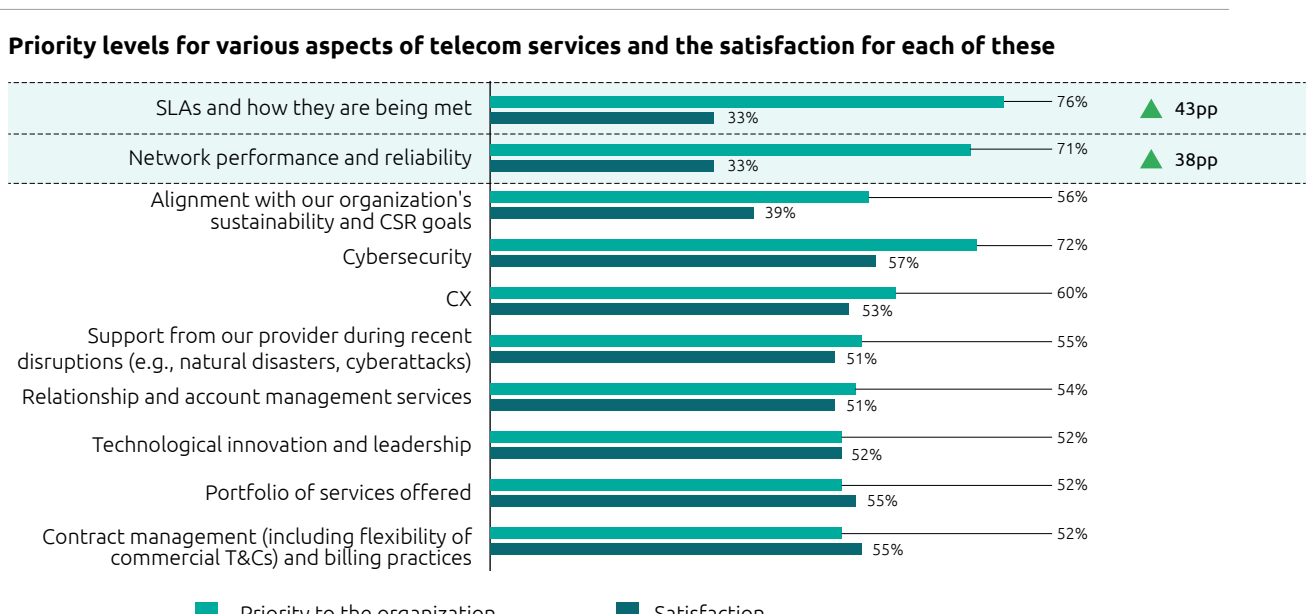
With organizations relying more heavily on technology to support their operations, the importance of SLAs, cybersecurity, and network performance and reliability has increased. These factors are critical to ensuring business continuity, minimizing downtime, and safeguarding sensitive data. SLAs set expectations for the working relationship between telecom providers and organizations, outlining the standards for service delivery, uptime, and support response times.

Cybersecurity has become a paramount concern and, as businesses shift permanently to cloud-based solutions and remote work environments, network performance and reliability are crucial for ensuring seamless operations. Telecom providers are seeking to harness emerging technologies such as AI and data analytics for network optimization.[1]

According to our research, more than seven in ten organizations prioritize SLAs, cybersecurity, and network performance and reliability. But the report finds that only one in three organizations is satisfied that their provider is meeting these priorities. This low satisfaction may stem from network congestion, inadequate fault resolution, lack of transparency in SLA enforcement —all of which hinder business continuity.

Figure 2.

While most organizations prioritize SLAs, and network performance and reliability, only one-third are satisfied with these areas



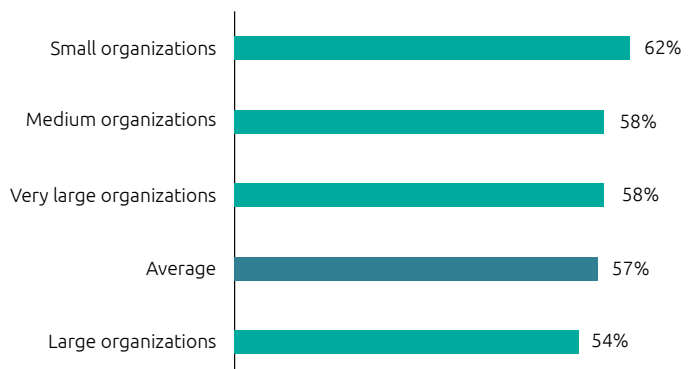
Source: Capgemini Research Institute, Telco business customers survey, December 2024–January 2025, N = 1,000 organizations.

Organizations demand flexible, tailored solutions

Almost three in five organizations are prepared to pay a premium for customized services. It is interesting to note that this preference for customized services varies across industry sectors. Seven in ten public sector organizations want customization even if it means higher costs, highlighting the sector's need for bespoke telecom solutions tailored to their regulatory, security, and operational needs. Among the small size organizations (with 50 to less than 100 employees), 62 percent prefer customization services, even at a premium. Customization could mean a variety of things — tailored service plans, industry-specific network configurations, dedicated bandwidth, enhanced security protocols, flexible SLAs or tailored support. Dean Rayne, Director, Private Wireless Solutions Development at BT Group, says: *"A majority of large telco business customers need highly customized, advanced solutions. The complexity of their business drives the need for customization, which could attract a premium. While it's easier to repeat and scale services for medium and small customers, large customers require a repeatable and scalable methodology that is tailored to their specific needs."*

Figure 3.
Almost three in five organizations want customization over cost

We prefer customized services, even if they come at a premium, over standard services



Source: Capgemini Research Institute, Telco business customers survey, December 2024–January 2025, N = 1,000 organizations. Organizations are categorized as small (50–100 employees), medium (100–999 employees), large (1,000–9,999 employees), and very large (10,000 employees or more).

Organizations often operate in highly dynamic environments, where business requirements can evolve rapidly. As such, they demand flexible, tailored telecom contracts. Traditional, one-size-fits-all packages are no longer suitable for businesses that require agility, scalability, and customization in their communications infrastructure. *"Balancing customization with cost can be a complex challenge. However, by integrating product management, sales, delivery, and operations under one organization, we can make informed trade-offs. Ultimately, it's about evaluating the importance and value to our customers against the cost to deliver, and making pragmatic decisions based on that equation,"* says Sofien Ben Sassi, Director of B2B Customer Experience and Digital Transformation at Proximus.

Gerhard Schauer, Vice President Global IT Workplace and HR Services at ZF, a global technology company supplying advanced mobility products and systems for passenger cars, commercial vehicles, and industrial technology, says: *"Telco companies are very good at offering three-year contracts, but they lack flexibility. Flexibility in resizing volumes and accommodating business growth or mergers is crucial yet often missing from current RFPs."* He adds: *"While long-term contracts can offer cost efficiency and stability, they also require a dedicated account management team. Providers in the US, for instance, excel in this area, but in other regions, such as Germany, we face challenges with finding a dedicated account manager to ensure smooth operations."*

"Balancing customization with cost can be a complex challenge. However, by integrating product management, sales, delivery, and operations under one organization, we can make informed trade-offs. Ultimately, it's about evaluating the importance and value to our customers against the cost to deliver, and making pragmatic decisions based on that equation."

Sofien Ben Sassi
Director of B2B Customer Experience and Digital Transformation, Proximus

02 Simplification: Making telecom easier for business customers

Business customers are increasingly looking for simplicity and flexibility from their telecom providers. The telecom sector often features complex pricing models and intricate purchasing processes, which can overwhelm businesses. Additionally, emerging technologies and the numerous solution options available further add to the complexity. To better serve their clients, telecom providers must offer adjustable service plans that grow with businesses, alongside bundled offerings, and streamlined contract negotiations.

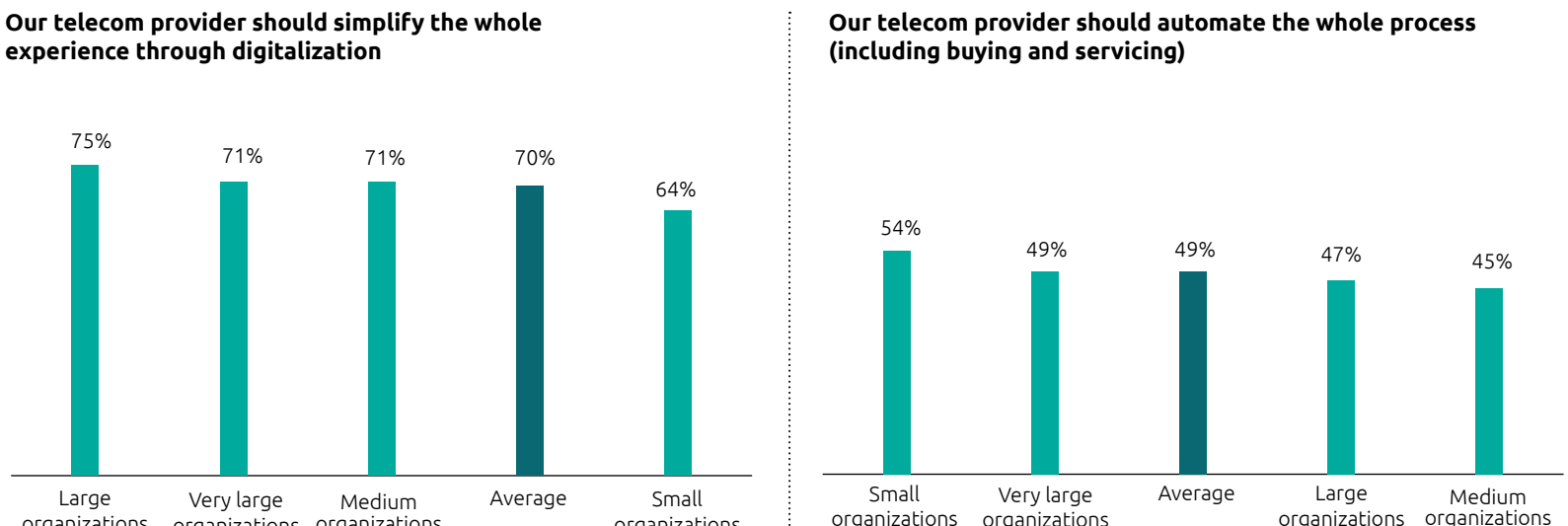
51%

Percentage of business customers who say that the telecom buying process is complex and that the providers should simplify the process

Flexibility in the buying process not only enhances customer satisfaction but also strengthens commercial relationships, as organizations seek telecom partners that can scale with their dynamic business needs and deliver efficient tailored solutions. Customers' expectations go beyond just purchasing; they desire a seamless, automated, and flawless experience in both service fulfillment and post-sales support. The Head of Customer Experience at an Italian telecom provider says: *"Telcos generally face challenges in updating their internal systems to meet the evolving needs of business customers. There is a need for faster and more efficient service delivery, which requires significant investments in upgrading billing systems, catalog capabilities, and automated processes."* According to our research, 51% of organizations feel that the telecom buying process is complex and providers should simplify the process. This sentiment is even stronger in the automotive sector, with 60% expressing the same opinion.

As part of this simplification, with digital transformation and changing customer expectations, organizations demand a seamless, flexible, digital experience when purchasing telecom services. Our research suggests that 70% of organizations expect telecom providers to digitalize the experience, while almost half feel that telecom providers should automate the whole process. Telecom providers are responding by pushing automation initiatives, building digital platforms or investing in AI. Vodafone's Business Marketplace, for example, helps business clients purchase and manage a variety of digital services and solutions, streamlining the procurement process and offering businesses greater flexibility and control over their telecom services.[2] Furthermore, small organizations (companies with 50 to less than 100 employees) are even more likely to feel this way: 56% say that telecom providers should simplify the buying process, and 54% expect automation of the entire process.

Figure 4.
Seven in ten organizations expect telecom providers to simplify the buying process



Source: Capgemini Research Institute, Telco business customers survey, December 2024–January 2025, N = 1,000 organizations. Organizations are categorized as small (50–100 employees), medium (100–999 employees), large (1,000–9,999 employees), and very large (10,000 employees or more).

Organizations favor digitalized buying and servicing processes

Business customers often express dissatisfaction with the buying process, which they feel fails to meet the dynamic demands of modern businesses, leading to inefficiencies and delays. Alessandro Canzian, Head of Group Go to Market and international enterprise marketing at Vodafone, says: *"Despite digital advancements, many still find it cumbersome to go through lengthy documents and sign approvals for even minor service additions. Simplifying this process could significantly enhance customer satisfaction. Speed of service delivery is another critical area for improvement. Customers are now accustomed to instant gratification and expect quick implementation and delivery of services."*

According to our research, only 22% of organizations are satisfied with current lead times, which is the duration between when a service request is made by a customer and when the service is actually delivered or activated. Small organizations are way more dissatisfied, with only 14% expressing satisfaction with their current telecom lead times. In recent years, organizations have increasingly favored digitalized buying and servicing processes for their efficiency, cost-effectiveness, and scalability. Telecom providers that can deliver their offerings without the need for manual intervention are perceived as cutting-edge, anticipating market demand. According to our research, 79% of organizations feel that order placement and processing should be digitalized, while 76% feel that product/service discovery should be digitalized.

70%

Percentage of business customers that say their telecom provider should simplify the whole experience [of buying and servicing] through digitalization

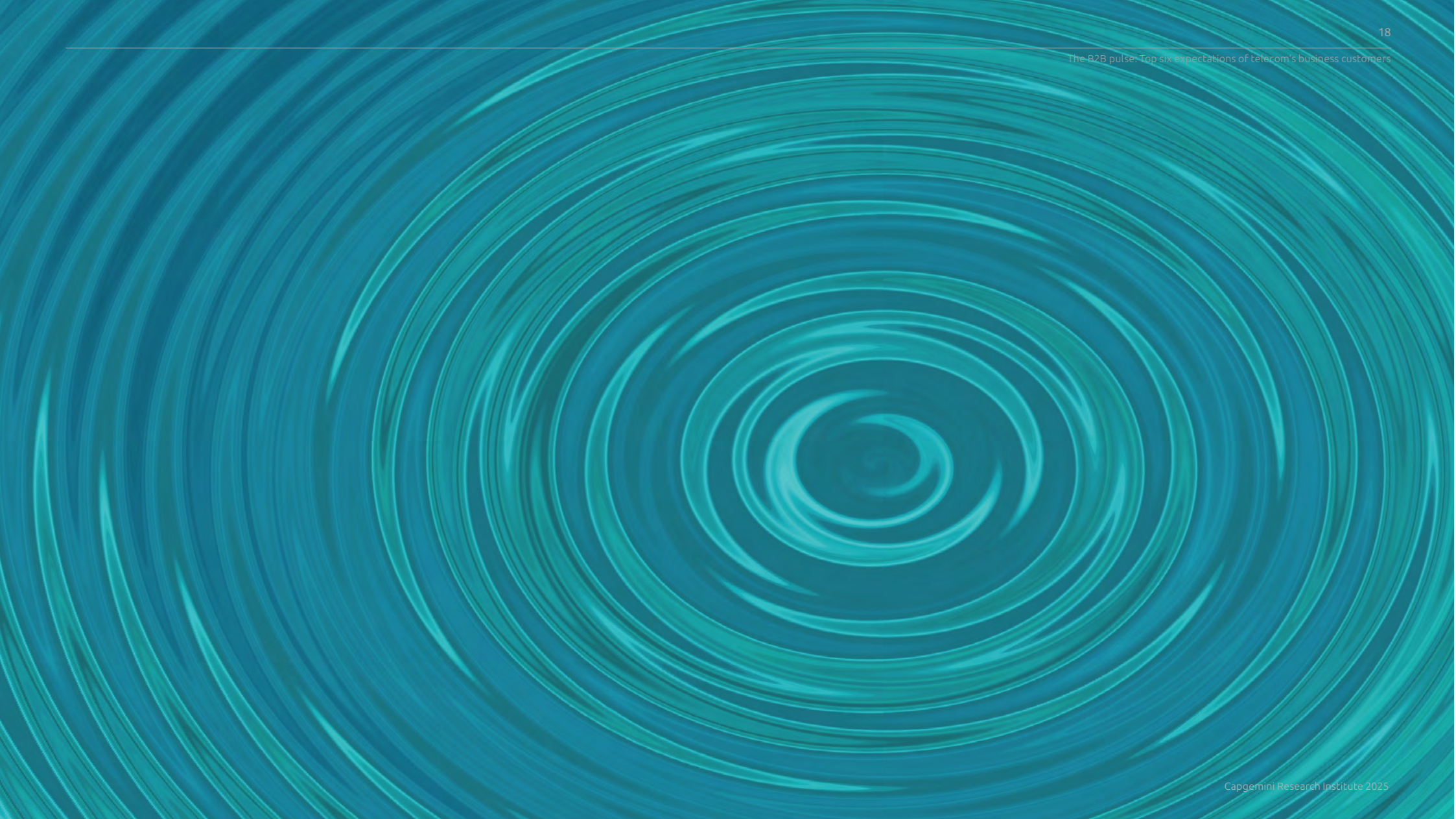
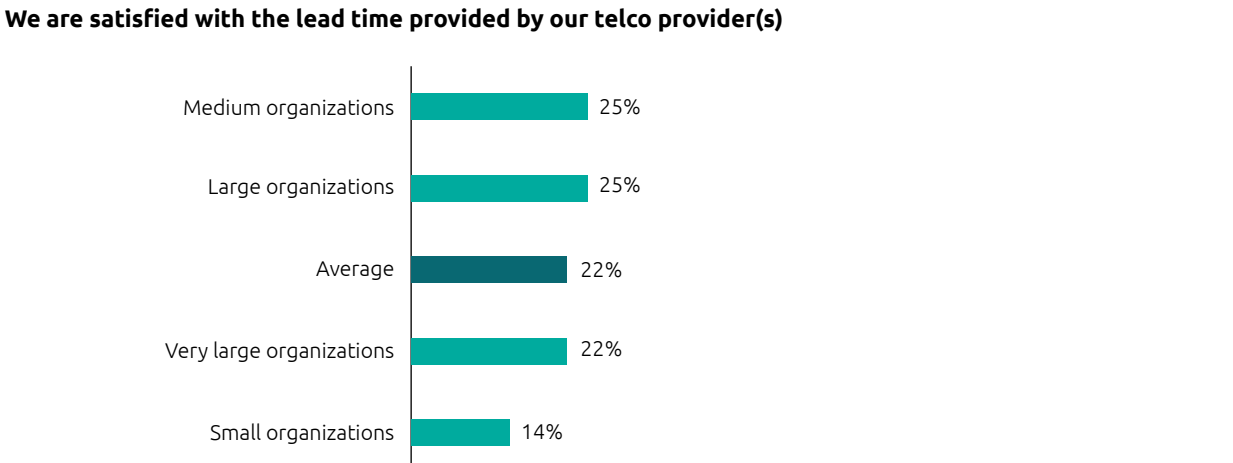


Figure 5.
Only about one in five organizations are satisfied with the lead time provided



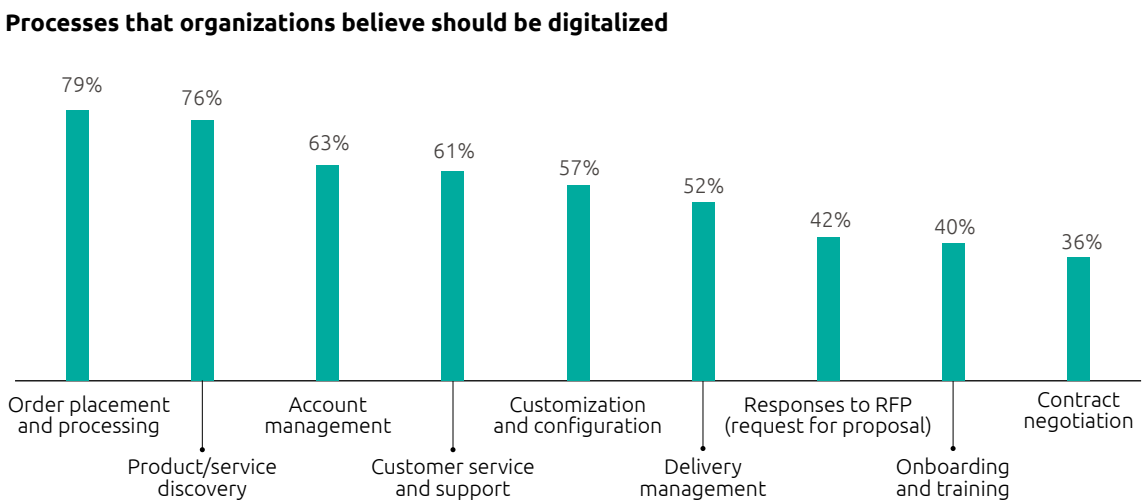
Source: Capgemini Research Institute, Telco business customers survey, December 2024–January 2025, N = 1,000 organizations. Organizations are categorized as small (50–100 employees), medium (100–999 employees), large (1,000–9,999 employees), and very large (10,000 employees or more).

Digitalized buying processes streamline procurement, allowing organizations to compare products and services easily, as well as request quotes and finalize contracts with minimal administrative overheads. This reduces the time and complexity involved in sourcing telecom solutions, accelerating the decision-making process. With the digital sales transformation of Swedish telecom multinational Telia, the organization was able to deliver business value quickly by launching a new go-to-market concept, digitalizing and automating its sales process, while reducing sales lead times by 70 percent.[3,4]

54%

Percentage of small organizations (50–100 employees) that would like their telecom provider to automate the whole process (buying and servicing), compared to the global average of 49%

Figure 6.
Business customers prioritize order placement and processing and product/service discovery for digitalization

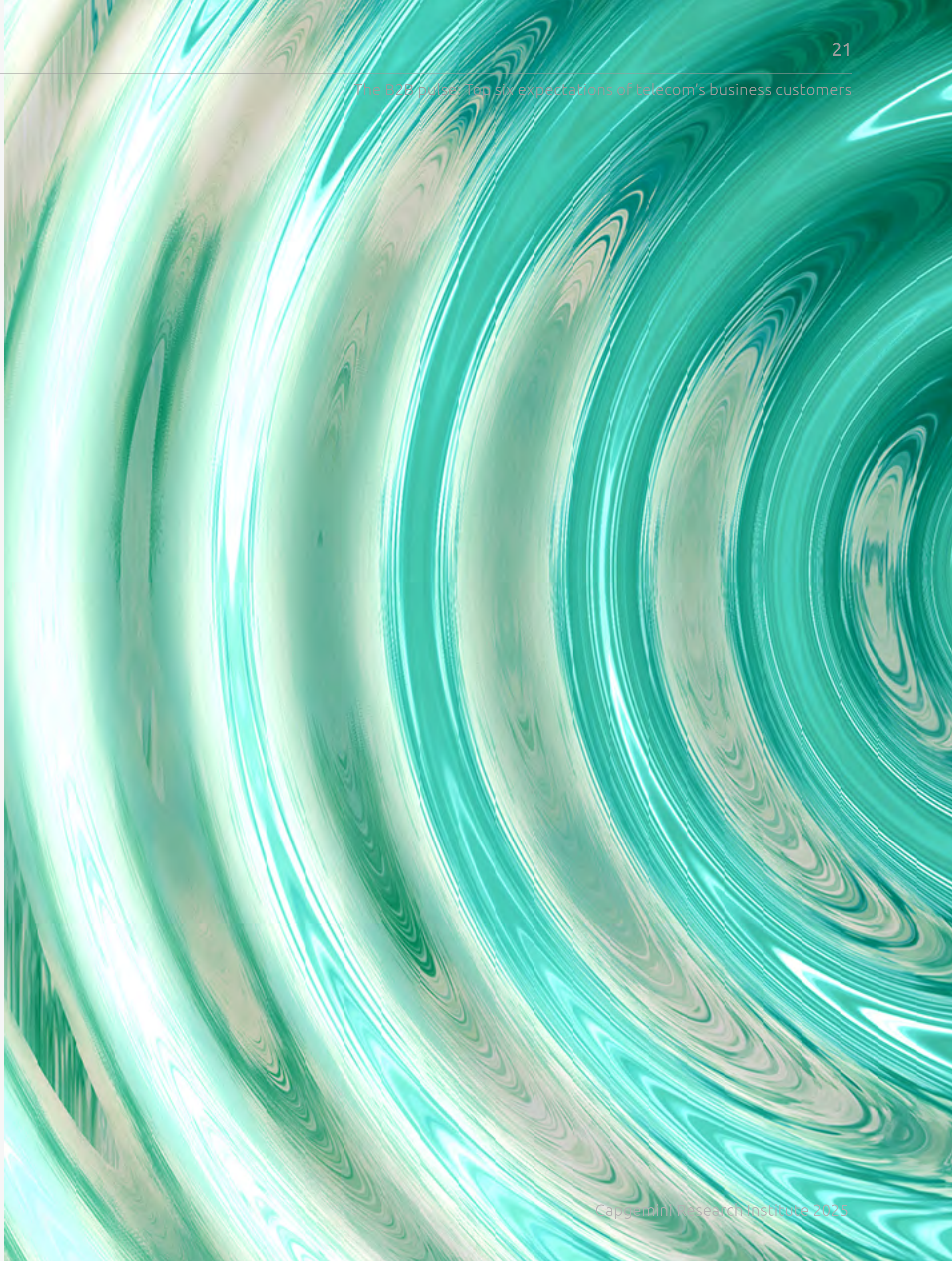


Source: Capgemini Research Institute, Telco business customers survey, December 2024–January 2025, N =1,000 organizations.

Aurélie Lesouëf, Vice President at Capgemini Invent, adds, *"In today's dynamic market, delivering the right solutions means more than connectivity—it's about deeply understanding our customers' unique challenges and crafting tailored strategies. By aligning advanced technology with strategic business goals and simplifying the buying and servicing process, the industry can enable seamless adoption and turn connectivity into a catalyst for lasting competitive advantage."*

"In today's dynamic market, delivering the right solutions means more than connectivity—it's about deeply understanding our customers' unique challenges and crafting tailored strategies. By aligning advanced technology with strategic business goals and simplifying the buying and servicing process, the industry can enable seamless adoption and turn connectivity into a catalyst for lasting competitive advantage."

Aurélie Lesouëf
Vice President, Capgemini Invent



03 Collaboration: Ecosystem integration and co-innovation are key

Increasingly, organizations seek service providers that exceed the traditional role of a partner. They seek providers who can facilitate ecosystem orchestration and collaboration, strategically building end-to-end, industry-focused solutions using the tools offered by the evolving tech landscape. As technology evolves, organizations are also transforming their operations to become more digital and agile. This shift from traditional to digital enterprise architecture increases the need for ecosystem orchestration and collaboration.

According to estimates, organizations' spending on more advanced tech services, including cloud and data centers, cybersecurity, IoT, analytics, AI, blockchain, and network application programming interfaces (APIs) is around five times the spend on traditional communications, totaling $1.16 trillion in 2023. This spending is expected to grow at a CAGR of 14 percent by 2030, reaching a market value of $2.91 trillion.[5] Organizations now seek an integrated ecosystem to innovate more effectively and address evolving customer demand. Our survey shows that three in five organizations expect their telecom providers to orchestrate an ecosystem that integrates IT, system support, and industry expertise (see Fig. 7).

Figure 7.

More than three in five business customers expect their telecom providers to orchestrate an ecosystem

Source: Capgemini Research Institute, Telco business customers survey, December 2024–January 2025, N = 1,000 organizations.

Telecom providers are now positioned to introduce new business models and solutions that operate across hybrid networks, edge computing, and cloud environments. For instance, Ericsson has launched a new service orchestration and assurance solution which provides the necessary tools for CSPs to orchestrate and manage services across multiple network domains in hybrid IT environments comprising multiple technology vendors.[6]

Further, two in five (40%) organizations today want a single service provider for all their services, while 62% want to collaborate more with their telecom providers. Very large organizations (with 10,000 or more employees) are more hesitant in relying on a single provider for telecom services and are open to collaborating with multiple partners, with only about 34% of these organizations currently preferring a single provider. This signifies the necessity for telecom providers to orchestrate an ecosystem.

Bjørn Martin Worsøe, director of B2B strategy from Telia, comments, *"Customers are buying a wider range of services from their telecom providers, because they want to reduce the number of vendors they want to handle. Further, system integrators who used to be significant providers of connectivity services have now opted out due to slim margins, making telco providers more critical in providing connectivity services and integration services."*

Gerhard Schauer from ZF emphasizes their plan to collaborate with a single provider,*"We aim to have one provider capable of managing all aspects, including PSTN [public switched telephone network] and Teams support. Additionally, a single provider could more effectively streamline our operations and significantly boost overall efficiency."* This underscores the importance for telecom providers to orchestrate a network of partners.

As organizations progress further along their transformation journeys, the role of telecom providers as ecosystem orchestrators becomes increasingly important. As we discuss in the next section, telecom providers must exhibit not only technical proficiency but also robust partnership management capabilities.

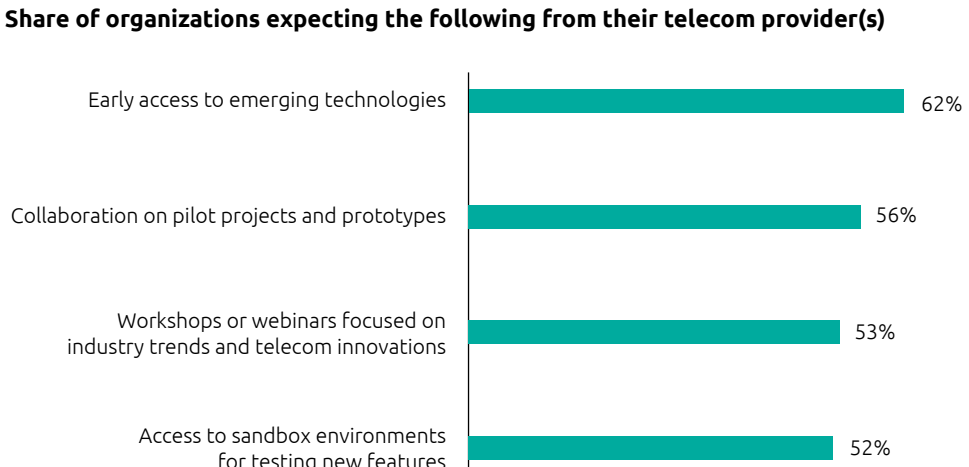
Organizations expect early access to emerging technologies and joint efforts on pilots and prototypes

Today, organizations expect their telecom partners to demonstrate a deep understanding of specific industry challenges and provide an early access to emerging technologies that will help them to stay ahead of the curve and maintain a competitive edge. Paul Daniels, Vice President, Global Technology and Cyber Security at Pentland Brands, a UK-based sports and lifestyle company, agrees, *"Telecom service providers are already evolving beyond their traditional roles. They are becoming innovation partners, bundling services and solving complex problems for organizations. Even new entrants to the industry are driving this transformation, making telcos key players in technology and innovation solutions."*

"Customers are buying a wider range of services from their telecom providers, because they want to reduce the number of vendors they want to handle. Further, system integrators who used to be significant providers of connectivity services have now opted out due to slim margins, making telco providers more critical in providing connectivity services and integration services."

Bjørn Martin Worsøe
Director of B2B strategy,
Telia

Figure 8.
Business customers expect early access to emerging technologies from their telecom providers



Source: Capgemini Research Institute, Telco business customers survey, December 2024–January 2025, N = 1,000 organizations.

In our survey, we found that as many as 62 percent of organizations expect early access to emerging technologies from their telecom provider, while more than half the organizations expect collaboration to develop sandbox testing environments and a shared outlook on industry trends and innovations.

However, our survey also reveals that organizations expect improvement in portfolio offerings, such as data analytics and IoT/edge connectivity solutions. Among the organizations that use these services from telecom providers, around three in five of those we surveyed voted that such portfolio offerings needed immediate improvement.

Collaborative pilot projects: Joint pilot projects are now a common avenue for testing new ideas in real-world scenarios. Telefónica recently partnered with Siemens to facilitate the digitalization and automation of industries in Spain, by harnessing advanced connectivity, and technologies such as IoT, digital twin, and AI.[7] In September 2024, Verizon collaborated with satellite service provider Skylo to develop first-of-its-kind satellite IoT technology. This partnership includes a commercial satellite-based messaging service and innovative IoT satellite trials.[8] Our research also indicates that 56 percent of organizations expect their telecom provider to collaborate on pilot projects and prototypes (see Fig. 8).

Organizations believe such partnerships can improve their operational efficiency and customer service, and provide them with a competitive edge by enhancing their innovation capabilities.

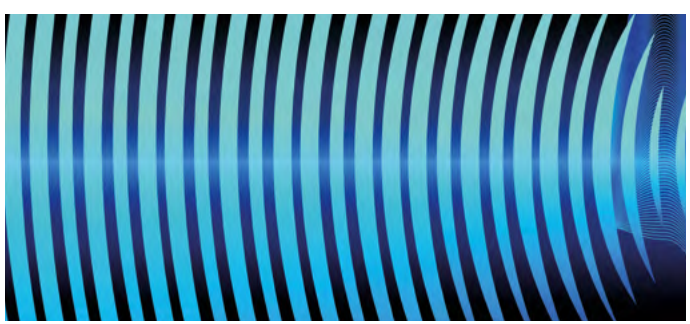
Recent examples of some collaborative business solutions launched by telecom providers include:

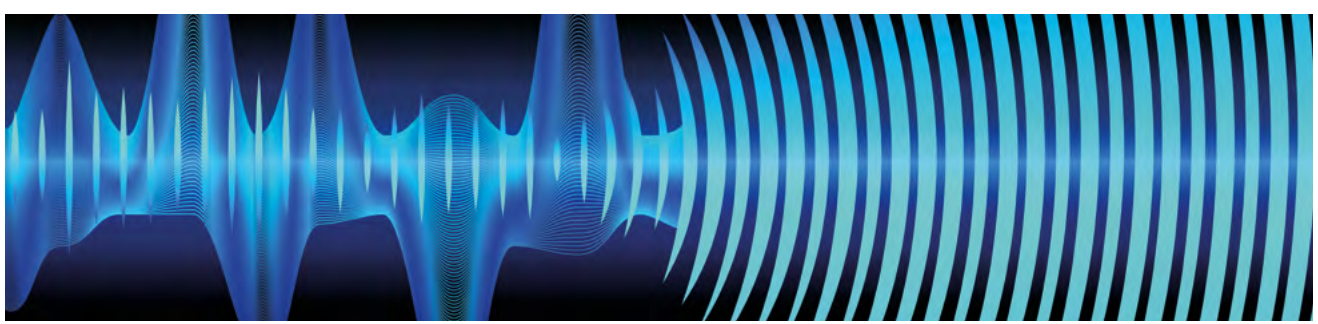
- Mavenir and Ice Norway have partnered to launch 5G network slicing specifically for military and public safety applications.[9] This collaboration aims to provide dedicated, secure, and reliable network slices tailored to the unique needs of these critical sectors. The initiative harnesses Mavenir's cloud-native network solutions and Ice Norway's extensive 5G infrastructure to ensure high performance and low latency.

- Orange's industrial maintenance solution integrates AI, a 5G private network, and IoT, and brings predictive maintenance and real-time monitoring to industrial settings by sharing real-time alerts to on-site operators.[10]

- GSMA's Open Gateway, which is a multi-telco initiative that transforms telecommunications networks into developer-ready platforms, enables enterprises to access advanced network capabilities.[11] Through global, standardized APIs, it offers new business opportunities, enabling the creation of optimized and more innovative digital services.

Praveen Shankar, global industry leader for telecom sector at Capgemini, adds, *"In today's hyperconnected world, transforming disruptive technology into real business value requires more than just connectivity—it demands deep collaboration. By forging strong partnerships with customers and industry peers, the telecom sector can cultivate an ecosystem where shared expertise fuels innovation, enhances operational efficiency, and drives sustainable growth."*





"In today's hyperconnected world, transforming disruptive technology into real business value requires more than just connectivity—it demands deep collaboration. By forging strong partnerships with customers and industry peers, the telecom sector can cultivate an ecosystem where shared expertise fuels innovation, enhances operational efficiency, and drives sustainable growth."

Praveen Shankar
Global industry leader for telecom sector,
Capgemini

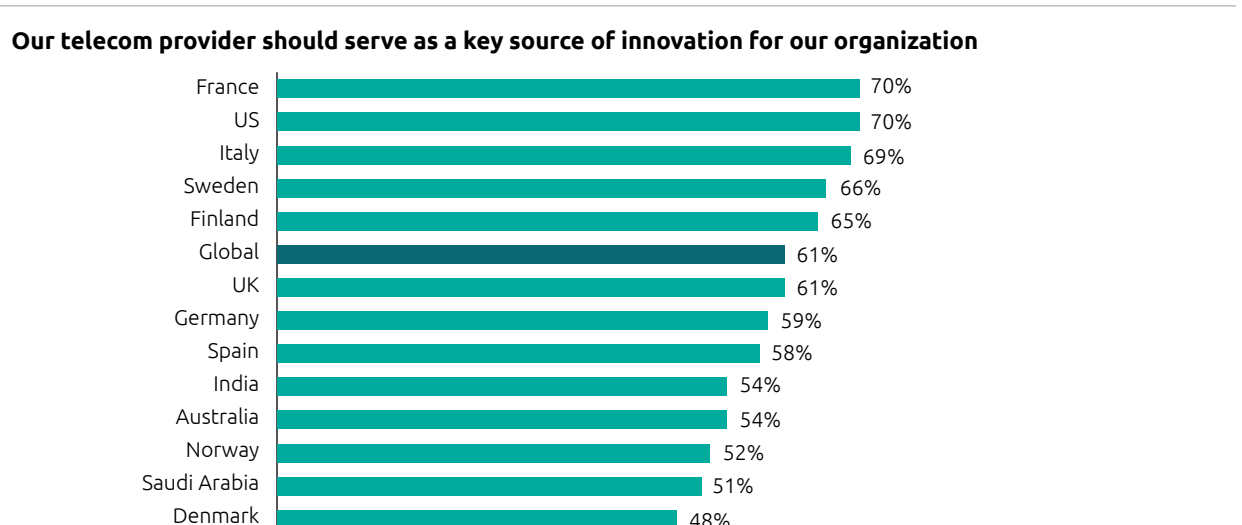
04 Innovation: Business customers expect their telecom provider to be a strategic partner

Telecom providers are increasingly positioning themselves as a partner to help companies in their digital transformation journey, and enable new business models. Three in five (61%) organizations are keen for their telecom provider to act as a source of innovation. This sentiment is stronger in countries such as France and the US, with 70% of organizations expressing the same preference.

In the automotive industry, telecom providers facilitate real-time data exchange through 5G networks, enabling autonomous driving, vehicle-to-everything (V2X) communication, and enhanced safety features. Similarly, IoT technology supports predictive maintenance, smart manufacturing, and fleet management, while infotainment systems in cars provide high-speed internet access and connected services.

In the financial services sector, telecom providers enable real-time transactions, enhanced mobile banking experiences, and seamless integration of fintech solutions. They support advanced data analytics and AI-driven customer offerings, and help to ensure data integrity and protection against cyber threats.

Figure 9.
Three in five organizations would like their telecom provider to contribute to innovation

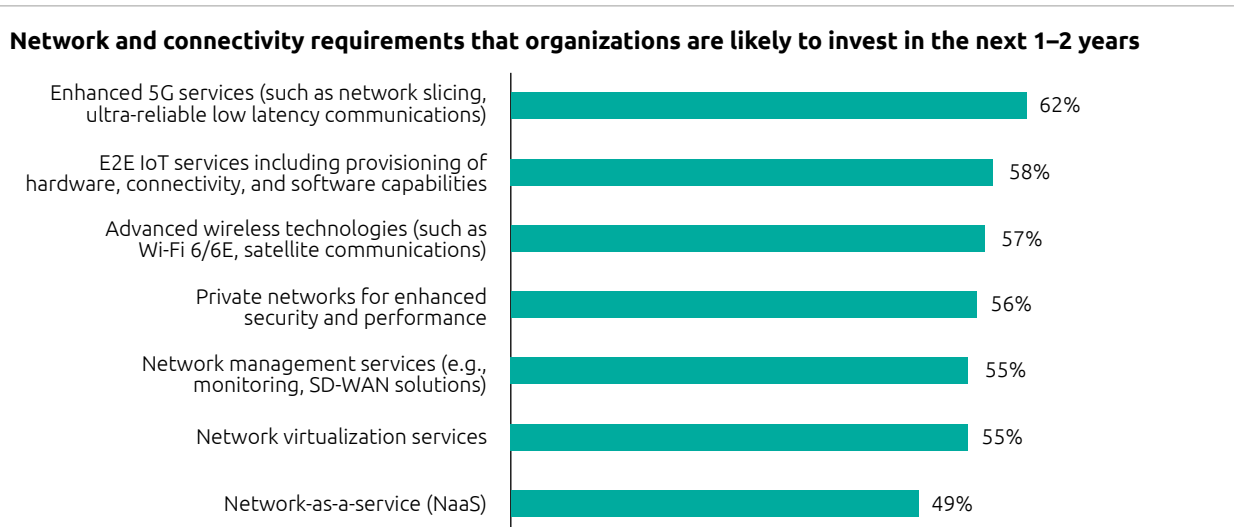


Source: Capgemini Research Institute, Telco business customers survey, December 2024–January 2025; N = 1,000 organizations.

Organizations value advanced connectivity

Most organizations (62%) are investing in enhanced 5G services such as network slicing and ultra-reliable low latency communications to support a variety of use cases such as autonomous vehicles, smart city applications, cloud connectivity, and real-time industrial automation. In November 2024, Ericsson and Orange Belgium successfully completed an automated lifecycle management of 5G network slicing in a live 5G environment, with the aim of addressing the specific needs of enterprise customers.[12] End-to-end IoT services, that include hardware, connectivity, and software provisioning, are critical to enabling intelligent ecosystems across sectors. For instance, smart factories rely on IoT solutions to monitor production lines in real time, optimize resources, and predict maintenance needs.

Figure 10.
Around three in five business customers plan to invest in enhanced 5G and end-to-end IoT services in the next 1–2 years



Source: Capgemini Research Institute, Telco business customers survey, December 2024–January 2025, N = 1,000 organizations.

Over half (56%) of organizations are considering investment in private networks for enhanced security, reliability, and control over data transmission and mission-critical applications. Private 5G networks offer significantly faster data speeds (up to 20 Gbps), ultra-low latency (one millisecond), a greater density of connected devices, and other advantages over long term evolution (LTE or 4G) networks. For example, Schneider Electric, Capgemini, and Qualcomm joined efforts to design and install an end-to-end 5G private network hoisting solution at Schneider Electric's hoisting lab in Grenoble, France. This solution improved connectivity performance and enabled new use cases.[13] Tesla deployed a large-scale private 5G network at its gigafactory in Berlin, Germany, allowing Tesla to coordinate machines remotely, track logistics, and wirelessly update software on assembled vehicles before they ship.[14]

62%

Percentage of business customers that would like their telecom provider to orchestrate an ecosystem, integrating IT, system support, and industry expertise

Telecom providers can play a role in the transformation of their customers

A. Organizations expect bundled services from their telecom providers to streamline vendor management while maximizing value

Bundling services allows businesses to streamline their operations, reduce costs, and enhance the efficiency of their communication infrastructure. Telecom providers typically offer a combination of voice, data, internet, cloud solutions, and security services, packaged into a single offering. This approach simplifies procurement processes and minimizes the need for multiple vendors, which can often lead to coordination issues and inefficiencies.

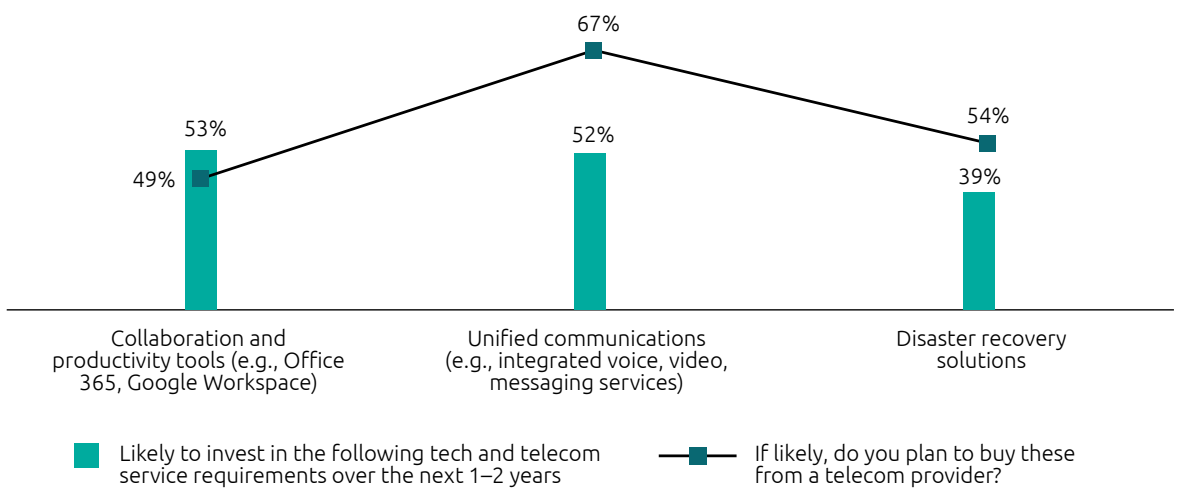
In our research, we see that a notable number of organizations are likely to purchase bundled services, including disaster recovery solutions and unified communications, from their telecom providers. For instance, 53% of organizations will invest in collaboration and productivity tools in the next 1–2 years, while 49% of this group are planning to buy this service from their telecom providers.

With organizations moving permanently to hybrid and remote modes of working, they are likely to invest more in collaboration and productivity tools. T-Mobile for Business, for instance, delivers Office 365 productivity apps including Microsoft Teams, Word, Excel, and PowerPoint, along with intelligent cloud services and security.[15] The BT and RingCentral partnership helps businesses collaborate with colleagues and customers over voice, video, and messaging on an easy-to-use platform.[16]

However, to maximize adoption and competitiveness in the B2B market, it is essential that telecom providers offer these bundled services at discounted prices to drive client loyalty, increase contract retention, and strengthen long-term business relationships. According to our research, more than three in five organizations expect access to bundled services at a discounted price.

Figure 11.
More than half of organizations seek collaboration and productivity tools and unified communications from their telecom providers, among the organizations planning to invest in these services

Share of organizations likely to invest in the following tech and telecom services and likeliness of procuring these from a telecom provider



Source: Capgemini Research Institute, Telco business customers survey, December 2024–January 2025, N = 1,000 organizations.

B. Organizations are willing to procure data, analytics, and managed cloud services from their providers

In today's rapidly evolving business landscape, organizations increasingly seek bundled services that offer comprehensive solutions for data storage, insights, and smarter decision-making. Telecom providers offer a range of integrated services, including data analytics, AI/machine learning (ML) solutions, managed cloud services, and edge/fog computing services.

Our research suggests that around three in five organizations will invest in data analytics services and AI/ML services in the next 1–2 years, with 65 percent of this group likely to buy data analytics services from their telecom providers, and a similar proportion likely to buy AI/ML services from their telecom providers. Telkomsel Indonesia has built a large data analytics business, MSIGHT, that serves various customers, including those in retail, banking, and even telecom.[17] Similarly, Vodafone's Analytics platform analyzes telecommunications data based on users' geolocation and behavior in compliance with GDPR regulations. They

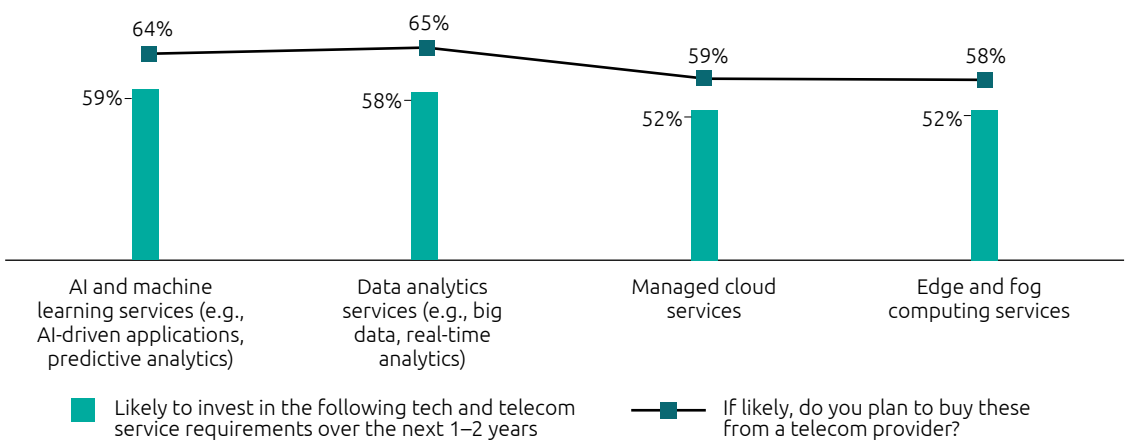
collaborate with insight and visualization partners, Citi Logik and CARTO, to provide data analytics services to business customers.[18]

We expect around 50% of organizations to invest in managed cloud services in the next 1–2 years, of which 59% plan to buy from their telecom providers. Major communication service providers have introduced direct cloud connectivity to major cloud providers, including Amazon Web Services (AWS), Microsoft Azure, Salesforce, Equinix Cloud Exchange, Google Cloud Platform, IBM Cloud, and Oracle Cloud. Telstra, an Australian telecom organization, has offset its fall in income from traditional sources (including calling applications, professional services, and equipment sales) by its growth in cloud and managed services. The organization reports an increase in revenue from network-attached storage (NAS) cloud applications of more than 18%, to $368 million from growth in demand for partner cloud products including AWS and Microsoft Azure.[19]

Our research suggests that 52% of organizations are likely to invest in edge and fog computing services; 58% of this group are likely to buy them from their telecom providers. This demand is driven by the need for powerful, scalable infrastructure that supports growing data storage and processing needs. By harnessing the telecom provider's infrastructure, businesses can avoid the complexity and capital expense of managing their own data centers.

Figure 12.
Among the organizations planning to invest in data analytics and AI/ML services, more than three in five have plans to buy these from their telecom providers

Share of organizations likely to invest in the following telecom tech and telecom services and likeliness of procuring these from a telecom provider



Source: Capgemini Research Institute, Telco business customers survey, December 2024–January 2025, N = 1,000 organizations.

C. Organizations prioritize cloud sovereignty to maintain control over data and processes

The concept of cloud sovereignty has gained substantial importance as organizations struggle to meet regulatory demands and satisfy stakeholders, particularly in the face of cross-border data flows and international data governance. Cloud sovereignty encompasses three key areas: data sovereignty, operational sovereignty, and technical sovereignty. Our research shows that all these areas are highly important to organizations. More than seven in ten organizations say that security is important to them, while more than three in five say that ownership of data, regulatory compliance, and portability are important cloud sovereignty elements.

The European Union (EU) intends to promote the use of European cloud providers to strengthen the EU economy and as part of its strategy to retain competitiveness and technological leadership. Hyperscalers in the US have access to enormous amounts of data. The European Commission would prefer that European cloud providers receive this "data advantage." EU policymakers also harbor geopolitical concerns about overreliance on foreign service providers and the impact of this on strategic autonomy.

The telecom sector has already taken the initiative in offering its customers cloud sovereignty. For example, in January 2024, Capgemini and Orange launched Bleu in a strategic partnership with Microsoft, with the aim of offering sovereign cloud services to French organizations based on Microsoft technology.[20] T Systems Sovereign Cloud, powered by Google Cloud, offers compliance with the requirements of German regulators, while retaining the public cloud functionality of a hyperscaler.[21] Telenor Group expanded its collaboration with AWS to advance its sovereign cloud posture by using AWS's sovereign-by-design technology and harnessing Telenor's strategic investment in sovereign data center organization Skygard.[22]

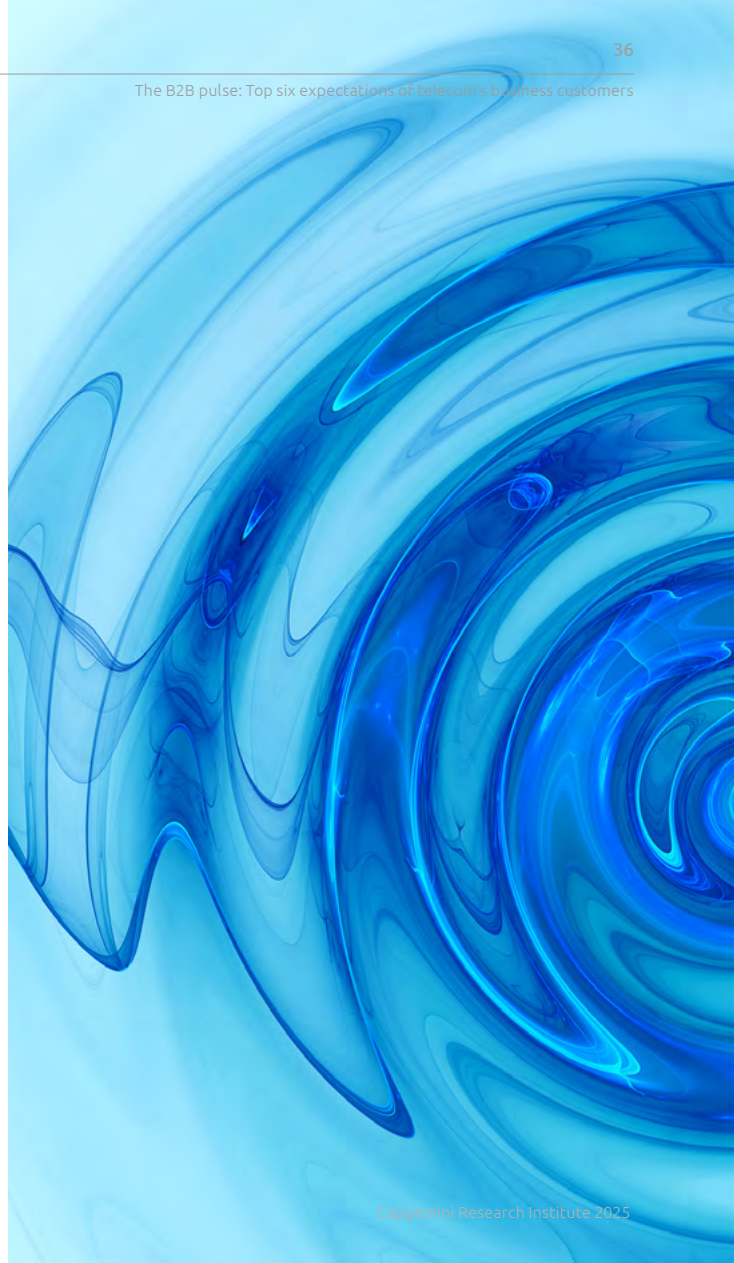
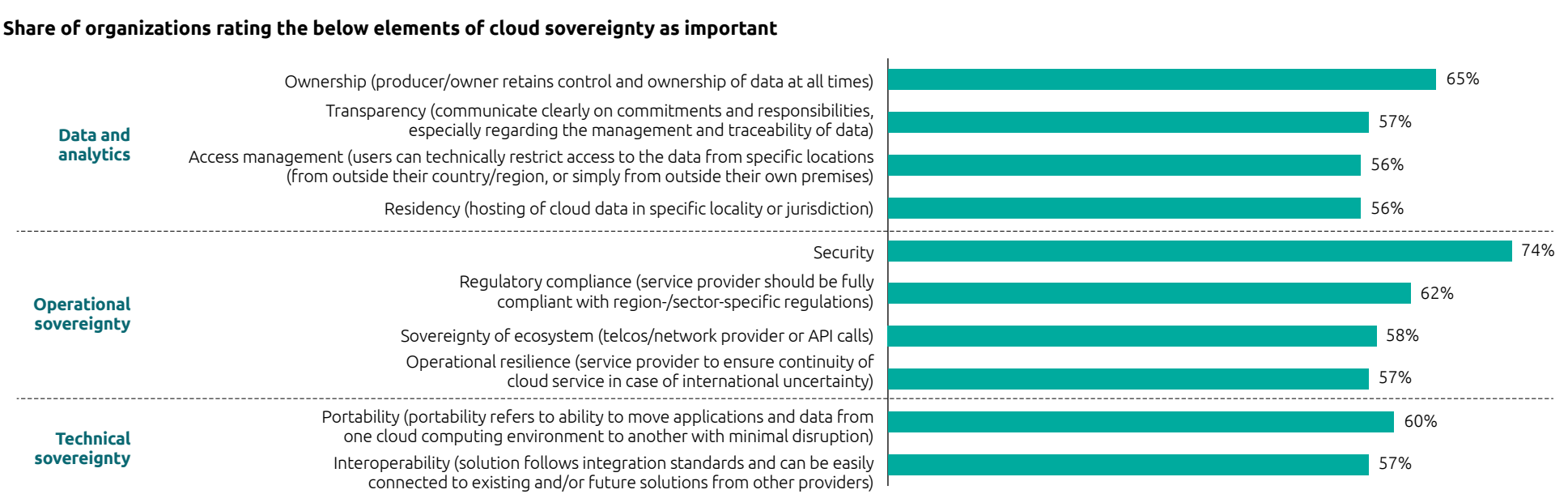


Figure 13.
Various aspects of cloud sovereignty remain a priority to majority of organizations



Source: Capgemini Research Institute, Telco business customers survey, December 2024–January 2025, N = 1,000 organizations.

Frédéric Vander Sande, Vice President at Capgemini Invent, adds, *"In today's rapidly evolving telecom and tech landscape, being bold and agile is non-negotiable. To seize new opportunities and swiftly align with customer expectations, the industry must pivot quickly, innovate relentlessly, and transform challenges into catalysts for strategic growth. Aiming at your own clients' business success, through and beyond connectivity and data, is paramount."*

61%

Percentage of business customers that expect their telecom provider to serve as a key source of innovation

"In today's rapidly evolving telecom and tech landscape, being bold and agile is non-negotiable. To seize new opportunities and swiftly align with customer expectations, the industry must pivot quickly, innovate relentlessly, and transform challenges into catalysts for strategic growth. Aiming at your own clients' business success, through and beyond connectivity and data, is paramount."

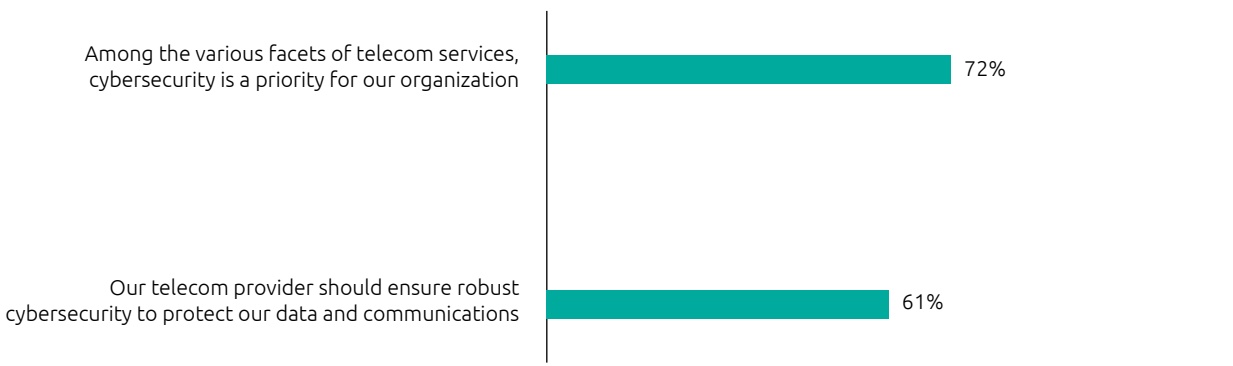
Frédéric Vander Sande
Vice President,
Capgemini Invent

05 Cybersecurity: Business customers seek robust protection from telecom providers

With technological advancements such as AI and Gen AI, cloudification, wireless/5G networks, and the expansion of digital services, the threat landscape for organizations is evolving rapidly. As the number of recorded cybersecurity breaches rises, including phishing, spear phishing, ransomware, deepfakes, and fraud schemes, organizations must enhance their cyber defenses. As many as 92% of organizations we surveyed in 2024 say they experienced a breach in 2023, a significant rise from 51% in 2021.[23] The Head of Customer Experience at an Italian telecom provider comments: *"Businesses are increasingly concerned about protecting their data and systems from cyber threats, and they look for comprehensive security solutions from their telecom providers."*

Telecom's business customers now expect their telecom providers to implement comprehensive and effective cybersecurity strategies to protect sensitive data, ensure business continuity, and maintain trust. Our research indicates that among the various facets of telecom services, cybersecurity is a top priority for 72% of organizations surveyed (**see Fig. 14**).

Figure 14.
Cybersecurity remains a key priority among the various telecom services



Source: Capgemini Research Institute, Telco business customers survey, December 2024–January 2025, N = 1,000 organizations.

To address the increasing demand for robust digital protection, stoked by increased data consumption and regulatory pressures, organizations are reaching out to their telecom providers. Three in five organizations in our survey expect their telecom providers to protect their data from malicious actors. To address this demand, telecom operators are partnering with cybersecurity firms and offering cybersecurity solutions, instances of which include:

- Airtel Business has partnered with Fortinet to offer comprehensive protection against cyber threats, ensuring secure and reliable internet connection for its enterprise customers.[24]

- Orange Business has partnered with watchTowr to enhance cybersecurity by proactively identifying vulnerabilities in customers' systems before breaches occur, thereby strengthening security postures and improving overall threat prevention for strategic enterprise clients in the Asia-Pacific region.[25]

- In October 2024, Vodafone launched cybersecurity platform CybSafe to assist small, medium, and enterprise businesses (SM&Es) in mitigating organizational human risk and improving cybersecurity behaviors within their teams.[26]

Organizations demand a range of security solutions

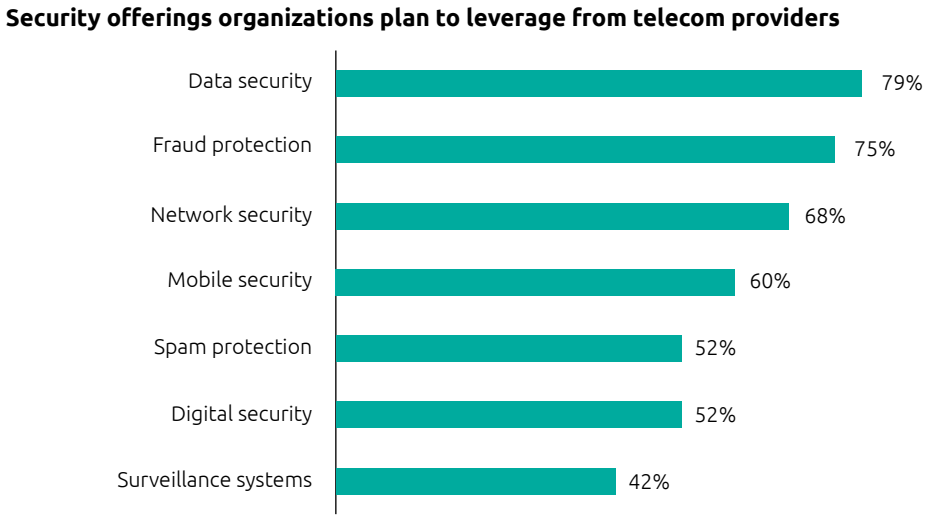
Organizations – and, increasingly, governments – are spending more than ever to protect their databases, critical operations, and defense systems. Studies estimate that cybersecurity now constitutes 12% of overall technology budgets, up three percentage points from 2020.[27] According to estimates, global cybersecurity spending is expected to reach $212 billion in 2025, an increase of 15% from 2024.[28]

Organizations are focusing on comprehensive security packages that combine traditional telecom security with advanced cyber protection measures. For example, BBVA has made an agreement with Telefónica Tech to enhance its global cybersecurity capabilities and protect its digital assets and customer data more effectively.[29]

A key area of focus is data security and fraud protection. Three-quarters of the organizations we surveyed plan to use these offerings from their telecom provider. Telecom providers need to understand industry-specific bottlenecks, monitor continuously for threats, and deploy tailored, proactive security prevention strategies. A Senior Director at an American telecommunications company, says: *"It's not just about keeping the network up, but also about preventing threats like bots or trojans that can infiltrate systems and cause disruptions, resembling network outages. By prioritizing security from the beginning and integrating it into every network management conversation, organizations can better protect their operations from evolving cyber threats."* BT's security chief Tris Morgan emphasizes the need for businesses to strengthen six key security layers including physical infrastructure, network, hosting, applications, data, and staff, while also adapting to new European regulations like DORA for financial institutions and Network and Information Systems Directive 2 (NIS2) for critical infrastructure.[30]

According to our survey, more than half of organizations (53%) are willing to invest in telecom tech services such as implementation of advanced cybersecurity solutions (e.g., AI-driven security, zero trust models, quantum-resistant encryption) in the next 1–2 years. While 48% of organizations want to buy these services from their telecom providers, telcos can tap into this trend to enhance their value proposition. By integrating tailored cybersecurity solutions into their offerings, telecom providers can strengthen customer relationships and generate new revenue streams, underscoring the strategic importance of cybersecurity in their service portfolios.

Figure 15.
Business customers want a range of security options from telecom providers



Source: Capgemini Research Institute, Telco business customers survey, December 2024–January 2025, N = 742 organizations.

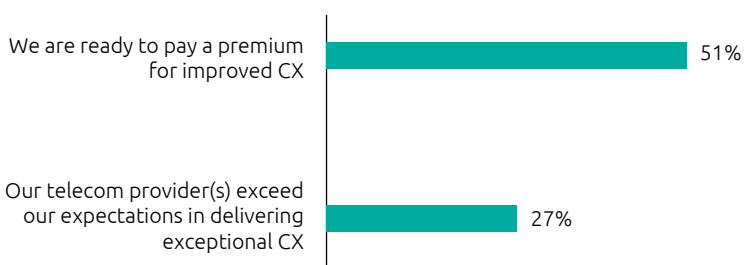
"We've prioritized sustainable network design, especially within our data centers, and are actively implementing advanced technologies to enhance security. We believe that leveraging automation is crucial for operational efficiency, and are committed to modernizing our infrastructure to meet future demands. Just as advanced AI is transforming industries, we see these strategic initiatives as vital for building a robust and adaptable network."

Rajat Arora
Senior Director, Strategy and Transformation,
PepsiCo

06 Enhanced CX: Business customers demand a responsive and seamless customer experience

CX is a critical factor in retaining clients and driving growth. Business service contracts could be long-term, so a subpar CX offering could lead to lost revenue and a damaged client relationship. As organizations evolve, they demand more than basic connectivity. In our research, only 27% mentioned that their telecom providers exceeded their expectations in terms of CX, while half mentioned that they would be ready to pay a premium for improved CX. One in two organizations are ready to pay a premium for improved CX. 49% of small organizations are ready to pay a premium, compared to 54% of medium-sized organizations. Fewer small organizations (22%) agree that their telecom provider exceeds expectations in delivering exceptional CX.

Figure 16.
Half of organizations would pay a premium for better CX



Source: Capgemini Research Institute, Telco business customers survey, December 2024–January 2025, N = 1,000 organizations.

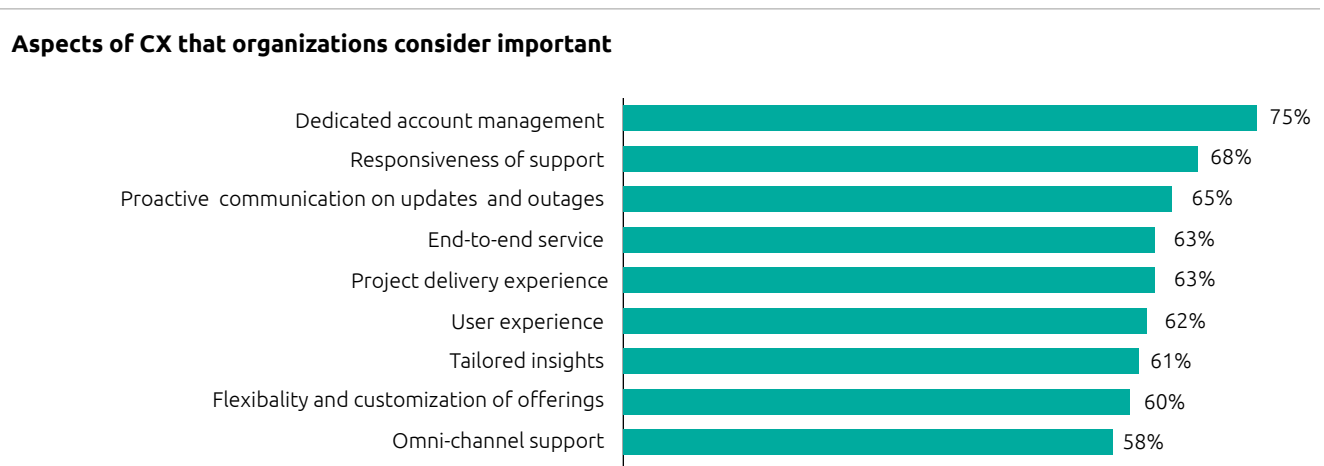
Account management and responsiveness are crucial for organizations

Our research findings suggest that dedicated account management is an important criterion of CX for as many as three-quarters of organizations (see Fig. 17). Organizations require account teams to understand their industry-specific needs, ensuring faster resolution of issues and provision of tailored solutions. This is particularly important to banking and public sector clients, with 81% prioritizing dedicated account management.

A striking 68% and 65% of organizations, respectively, prioritize responsiveness of support and proactive communication, highlighting the need for telecom operators to move from reactive to anticipatory service models. Similarly, the high placing of end-to-end service delivery (63%) and project delivery experience (63%) emphasize the importance of seamless implementation.

Telecom organizations are making strides in enhancing CX. In 2024, Vodafone announced a decade-long strategic alliance with Microsoft. Over the next 10 years, Vodafone will invest $1.5 billion in cloud and customer-focused AI services developed in collaboration with Microsoft. In return, Microsoft will utilize Vodafone's fixed and mobile connectivity services. Vodafone plans to transform its CX by deploying Microsoft's Gen AI tools.[31] In another example, Telefónica Tech, a key holding of the Telefónica Group, streamlined the client acquisition platform for Virgin Money by developing an automated onboarding platform using Microsoft Power Platform and Dynamics 365. This digital platform helped provide a seamless experience for Virgin Money's customers, allowing digital onboarding and underwriting for 20% of customers, with 50% of accounts opened within five days.[32]

Figure 17.
Dedicated account management is a priority for three in four organizations

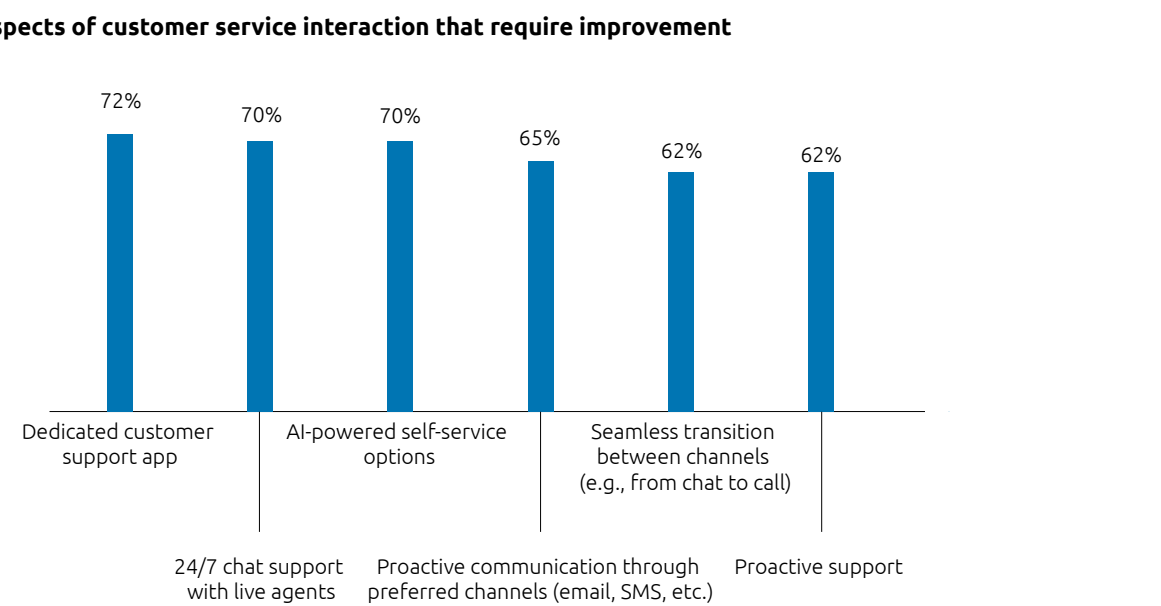


Source: Capgemini Research Institute, Telco business customers survey, December 2024–January 2025, N = 1,000 organizations.

Organizations require dedicated customer support, AI-powered self-service, and 24/7 assistance

Our research also revealed significant gaps in customer service interactions, with around seven in ten organizations citing the need for improvement in dedicated customer support, 24/7 assistance with live agents, and AI-powered self-service options. These shortcomings highlight that telecom providers should focus on modernizing and enhancing service delivery. The high demand for dedicated customer support apps indicates a need for centralized, user-friendly platforms that enable businesses to manage tickets, monitor service performance, and access support resources.

Figure 18.
Seven in ten organizations cite dedicated customer support, 24/7 assistance, and AI-powered self-service options as areas for improvement



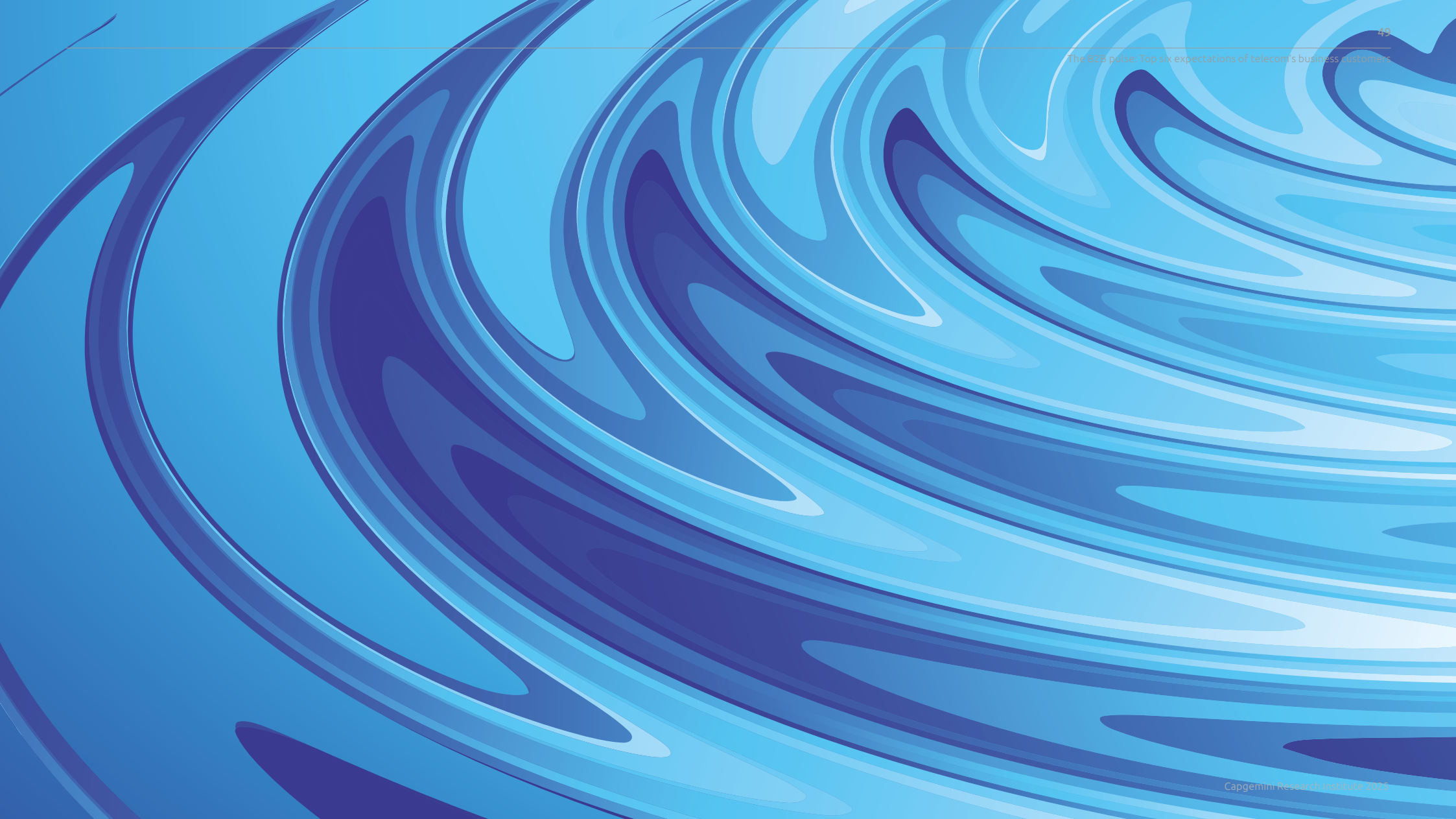
Source: Capgemini Research Institute, Telco business customers survey, December 2024–January 2025, N = 1,000 organizations.

AT&T built its own Gen AI tool for its employees, Ask AT&T. This tool helps employees across network engineering, finance, and software development, among other areas. It can also help make customer service agents more efficient in addressing customer questions.[33] Telstra launched Telstra Connect, a digital platform for managing its enterprise services. It provides a central hub where business clients can view and manage their Telstra products and services. It also provides a self-service functionality and the ability to monitor networks, manage the fallout from any incidents, submit and track service requests, and communicate with customer support, among other functionalities.[34]

Alessandro Canzian from Vodafone says: *"To differentiate themselves and be prepared for the future, enterprises should focus on enhancing the purchase and lifecycle experience for customers. It's challenging to stand out solely based on technology, so the key differentiator will be CX."*

"To differentiate themselves and be prepared for the future, enterprises should focus on enhancing the purchase and lifecycle experience for customers. It's challenging to stand out solely based on technology, so the key differentiator will be CX."

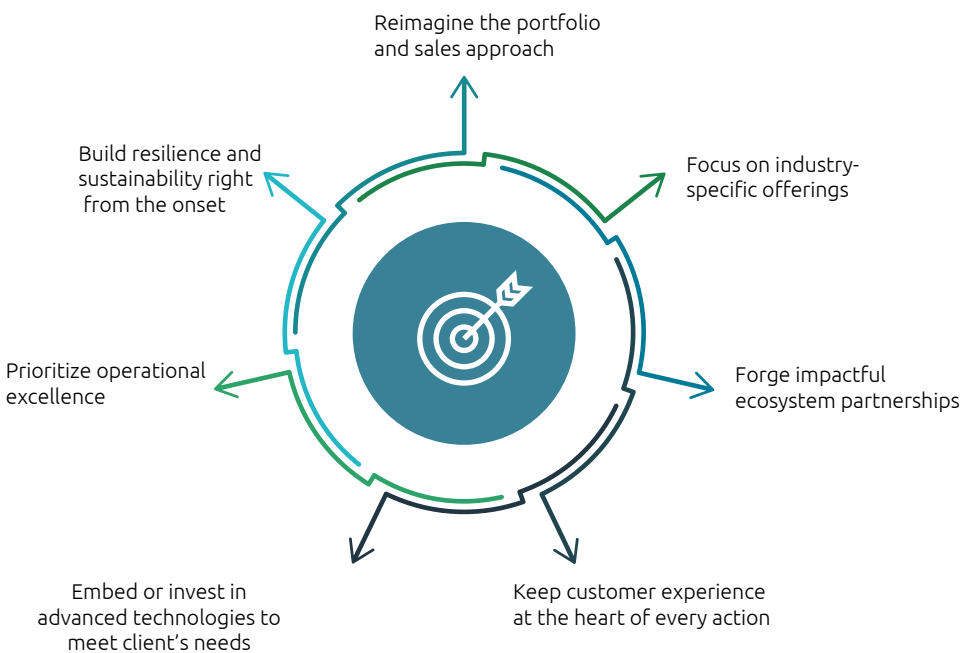
Alessandro Canzian
Head of Group Go to Market and international enterprise marketing, Vodafone



How the telecom sector can seize the B2B opportunity

To navigate the bountiful but complex landscape of B2B opportunities, based on our research, in-depth interviews, and experience, we make the following recommendations. The recommendations are bucketed into seven key areas (see Fig. 19).

Figure 19.
Recommendations for the telecom sector



Source: Capgemini Research Institute analysis.

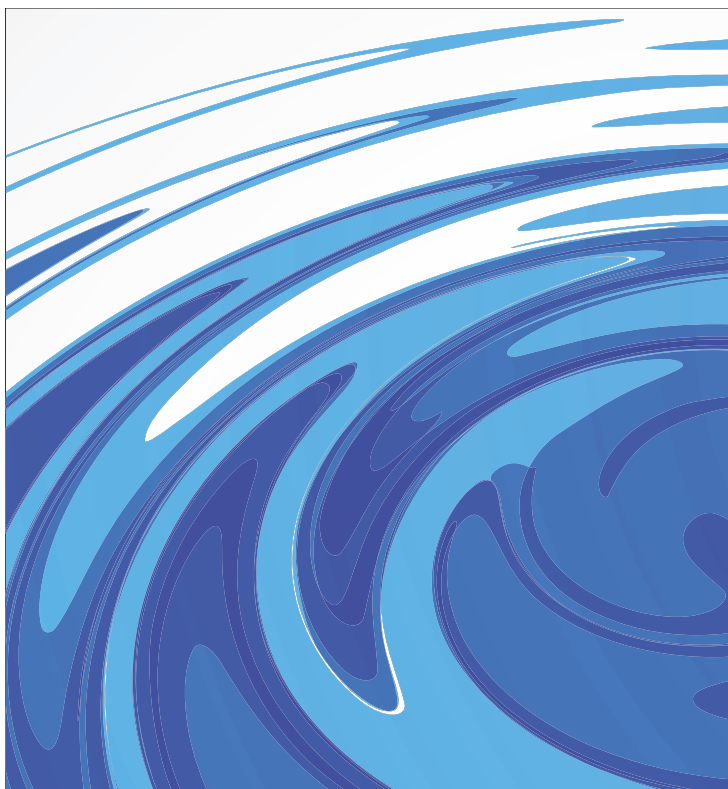
Reimagine the portfolio and sales approach

To survive in the current landscape, telecom providers must revamp their portfolio offerings. While organizations are keen to access services beyond the core offerings, we see in our survey that only 27% of organizations are purchasing AI and automation (such as automated network management) and only 28% of organizations purchase data analytics services from their telecom providers. As with all sectors aspiring to transition, telecom providers must gain a deep understanding of their customers and tailor their offerings accordingly. Below are some suggestions as to how.

Shift to a solutions-first approach

Telecom providers need to transition from selling standalone products to offering end-to-end customized solutions catering to organizations' specific requirements. This will allow them to position themselves as strategic business partners in their customers' digital transformation journeys.

In our survey, we see almost six in ten (58%) organizations want to invest in industry-specific solutions (such as virtual care or virtual pharmacy solutions for life sciences). However, only 37% are willing to purchase them from their telecom providers. Telecom providers have a significant opportunity to bridge this gap. For instance, for the automotive industry, Thales' On-Demand Connectivity (ODC) service integrates an e-SIM management platform that allows vehicles to connect to cellular networks from anywhere in the world.[35] This enhances user experience by supporting advanced telematics and vehicle-to-everything (V2X) communication. Similarly, telecom organizations are partnering with healthcare providers to deliver telehealth services, and end-to-end security solutions.



Introduce flexible pricing models

To better serve business customers, telecom operators should consider moving away from rigid pricing structures which can often overwhelm businesses. As businesses grow and evolve, telecom providers must offer the ability to adjust service plans, bundle offerings, and streamline contract negotiations. Microsoft's Anna Kopp comments: *"We have global employees who travel frequently, and buying additional data packages for short trips can be very expensive. We need more flexible telco rates that can adapt to our needs on a weekly, rather than monthly, basis."*

Further enabling flexibility of pricing models can position telecom providers well in emerging markets. For example, AT&T is enhancing its mid-market B2B segment by bundling and repackaging products tailored for SMEs.[36] Service providers must introduce subscription-based or pay-as-you-use models that align with operational realities. For instance, BT's network-as-a-service (NaaS) allows organizations to adapt their networks to suit their needs and streamline operations, reduce costs, and enhance overall efficiency.[37] Further, these platforms also allow users to centralize control and automate processes on digital interfaces, and can be accessed on a pay-as-you-use basis.

Harness the power of AI and analytics

By using AI, telcos can identify customer pain points through advanced data analysis and predictive modeling. This enables them to better understand customer behavior, preferences, and issues. AI will boost customer retention using churn prediction and sentiment analysis. Telcom providers can use these insights to provide bundled packages that reflect the customers' needs, and enhance user engagement. By analyzing vast amounts of data from customer interactions, network performance, and service usage, telcos can position themselves as strategic business partners. AI and analytics can anticipate customer needs and preferences, strengthening relationships and loyalty, and ultimately driving business growth and revenue. Deutsche Telekom's Magenta AI service uses AI to provide predictive maintenance and support for business clients.[38] This service helps businesses anticipate and resolve issues before they impact operations, ensuring smoother and more reliable service delivery.

Focus on industry-specific offerings

Traditional connectivity services are insufficient to meet the complex requirements of digital transformation. To remain competitive and generate ongoing revenue, telecom providers must develop industry sector-specific solutions and embrace vertical integration.

Design tailored, sector-focused offerings

Around 61% of organizations in our survey expect customized solutions, and 59% want access to industry expertise through collaborating with their telecom partners. Telecom providers need to understand the specific challenges and requirements of each sector and redesign their offerings accordingly. With the emergence of non-traditional connectivity providers such as hyperscalers and satellite companies, telecom providers must innovate to compete and adapt to market dynamics.

For instance, Maxis has partnered with a Malaysian retailer group to enhance 5G adoption across the retail sector.[39] The partnership seeks to improve retail CX and increase operational efficiency through advanced connectivity and digital solutions. These encompass retail analytics, AI-powered computer vision, managed network services, XR experiences, and supply chain enhancements, all supported by secure connectivity and cloud infrastructure.

Enable end-to-end vertical integration across various sectors

For a significant time, telecom providers have been offering sector-specific solutions with connectivity offerings such as voice and data bundles, IoT capabilities, and specialist communication products. But the vertical markets are still challenging environments for telecom providers to generate enough scale due to lack of specialized expertise, fierce competition from established players, limited vertical-specific offerings, and regulatory and compliance challenges, among other factors.

To stay competitive, telecom providers must offer integrated services that extend beyond connectivity. Raffaele Gricinella, corporate and public sector marketing director at Vodafone, comments, *"There is a growing trend among small to medium-sized organizations towards seeking comprehensive, end-to-end services from a single provider. This simplifies management and ensures better coordination and support. These customers prefer having a one-stop shop for all their IT needs, reducing the complexity of dealing with multiple vendors."*

China Mobile, for instance, has collaborated with Huawei to enhance its IoT service support system, addressing challenges in industry convergence and security compliance.[40] This partnership has led to the development of a comprehensive platform that supports over 1.4 billion users, enabling efficient management of IoT services across various sectors. By integrating advanced technologies such as AI and big data, the system aims to drive digital transformation in industries such as smart cities and industrial automation, ultimately promoting intelligent connectivity and enhancing operational efficiency.

"There is a growing trend among small to medium-sized organizations towards seeking comprehensive, end-to-end services from a single provider. This simplifies management and ensures better coordination and support. These customers prefer having a one-stop shop for all their IT needs, reducing the complexity of dealing with multiple vendors."

Raffaele Gricinella
Corporate and public sector marketing director,
Vodafone

Forge impactful ecosystem partnerships

Evolving enterprise demands a collaborative approach. Partnerships across and within industries can boost innovation, secure market position and, most importantly, retain business. Telecom providers need to invest more in collaborative projects and co-innovation.

Cultivate industry-specific alliances

Partner with industry leaders to co-create solutions that integrate telecom capabilities into sector ecosystems (e.g., healthcare data platforms, smart manufacturing). Forming alliances with industry leaders can support the integration of telecom capabilities into various sector ecosystems. For instance, in healthcare, telecom providers can collaborate with medical technology companies to develop advanced data platforms that enhance patient care through real-time monitoring and telemedicine. Partnerships with industrial automation firms can lead to the creation of connected factories that optimize production processes and reduce downtime.

A notable example of such collaboration is the recent joint venture, Aduna, between Ericsson and 12 other leading telecom operators, to create a network API company.[41] This venture aims to sell network APIs on a global scale, enabling developers to access and utilize advanced network capabilities more easily. By standardizing APIs, this partnership facilitates the development of innovative applications across various sectors, such as anti-fraud verification in finance and dynamic video quality adjustment for streaming services.

Build open, interoperable platforms

Developing an open platform allows the integration of services and technologies from a range of partners, while maintaining operational flexibility. Service providers should ensure solutions are platform-agnostic to facilitate seamless integration with clients' existing systems at lower cost.[42] It also helps transition to fewer vendors and integrate new technologies, increasing operational efficiency. Nokia's Event-Driven Automation (EDA) platform aims to streamline data center operations, enhancing efficiency and reducing costs. They reduce network disruption and application downtime while decreasing operational effort by up to 40 percent. Additionally, the platform offers robust security features to protect data and infrastructure. In Spain, MásMóvil partnered with Singtel to launch Spain's first enterprise 5G network management and edge/cloud orchestration platform that also offers APIs and as-a-service applications to its enterprise and government customers.[43] Such collaborations intensify local market presence to deliver robust and scalable network services. This initiative is expected to drive digital transformation for Spanish organizations, with improved network performance and reliability.

Co-innovate for competitive advantage

Investing in joint R&D initiatives with business customers can help telecom providers stay ahead of emerging trends. We see telecom providers adopting various co-creation solutions to position themselves as leaders in new-age technologies. For instance, Japan's NTT DOCOMO adopted a marketplace model for the co-creation of solutions with partners to achieve cost-effective delivery of digital services to enterprise and SME customers.[44] Operating revenue for DOCOMO grew 4.2% during its most recent financial year, with operating profit up 14.7%. Similarly, it can help launch new services and products, helping telecom providers stay ahead of the curve and augmenting their value preposition. Deutsche Telekom, for example, introduced the world's first 5G+ gaming offer

based on network slicing, in collaboration with ALSO and Ludium Lab.[45] This innovative service ensures smooth, lag-free mobile gaming by using 5G technology, providing gamers with a competitive edge.

75%

Percentage of business customers that highlight dedicated account management as an important aspect of CX

Keep CX at the heart of every action

CX should be the heart of any business, driving consumer satisfaction and retention and, through this, revenue growth. Business leaders should invest more in enhancing CX for their business customers in the following ways.

Deliver comprehensive omnichannel support

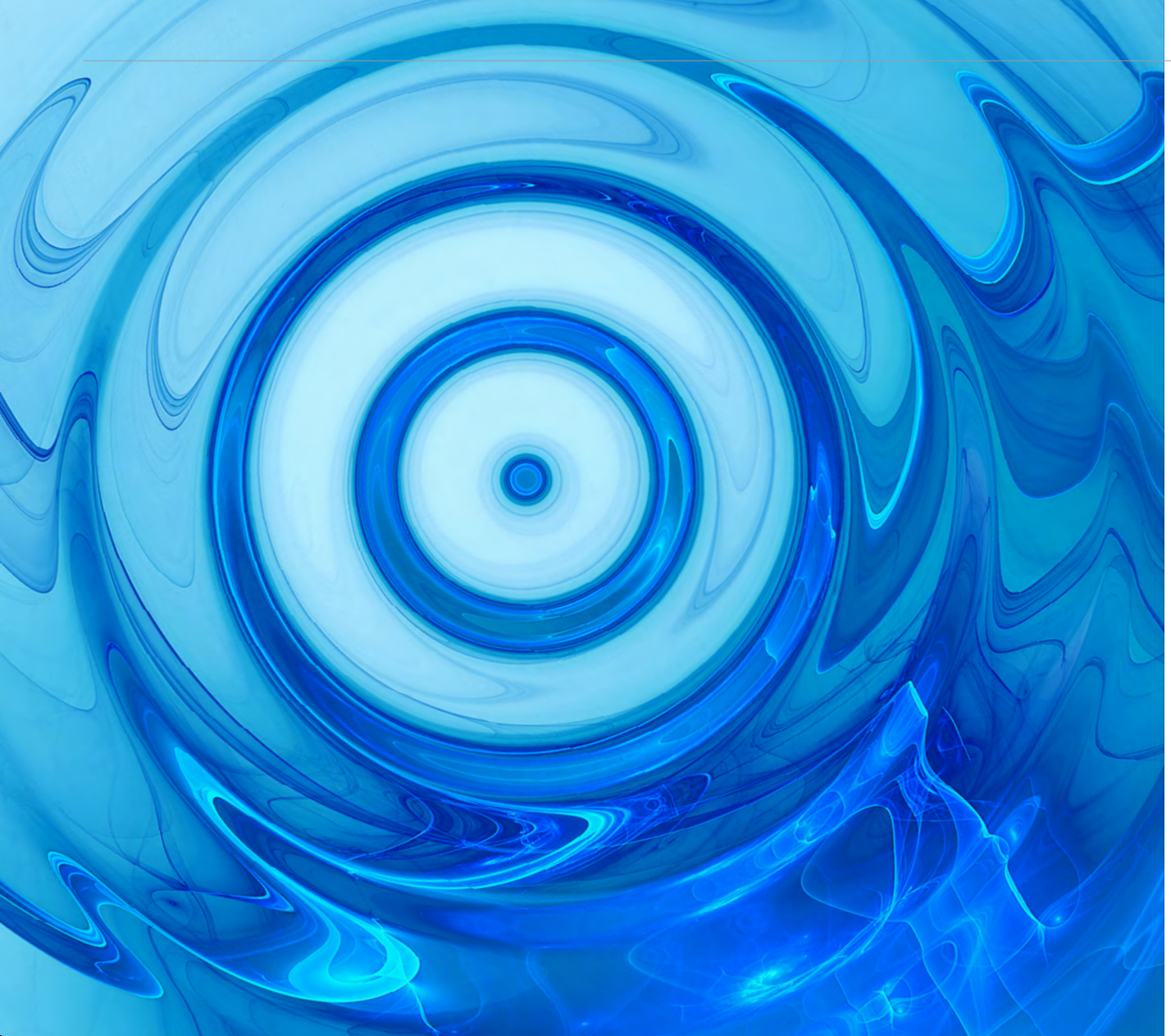
Telecom providers should provide integrated support across digital and physical touchpoints. A unified support strategy ensures faster response times, personalized assistance, and a more coherent customer journey. Our research suggests that almost three in five organizations find omnichannel support an important CX offering from their providers. True omnichannel experiences require integration across all channels, ensuring that data is shared in real time, and interactions are personalized. This helps with reducing customer frustration and improving loyalty. Providers should also look at creating a unified support team that can handle all interactions, including both sales and service.

Use automation to create personalized interactions

Our research highlights that 70 percent of organizations feel that live agent support is inadequate. AI-powered chatbots can offer 24/7 support and enable faster resolution times and consistent service delivery for business customers, handling routine inquiries, troubleshooting common issues, and providing real-time updates on service status, freeing up human agents for more complex tasks.

Technologies such as AI/Gen AI and advanced analytics enable telecom providers to analyze vast amounts of customer data to identify trends and predict future needs of business customers, including tailored recommendations, customized service packages, and proactive solutions for network performance issues. Personalized interactions based on data-driven insights not only improve client satisfaction but also increase customer loyalty.

Automating routine processes, such as billing inquiries, plan modifications, or service troubleshooting, ensures that clients experience faster response times and fewer service disruptions. AI chatbots can escalate unresolved issues to human agents, providing context.



Focus on service reliability

For business customers, even brief service interruptions can lead to significant operational and financial losses. Telecom organizations must adopt a more proactive approach to network management, with an emphasis on reducing downtime and ensuring uninterrupted service. Service reliability is a critical factor in attracting and retaining business customers who require continuous connectivity. Proactive monitoring systems can identify potential issues before they impact service delivery.

71%

Percentage of business customers that highlight network performance and reliability as a priority

Embed or invest in advanced technologies that can meet clients' needs

Telecom providers must prioritize investment in advanced technologies to meet the evolving needs of their clients or ensure access to these through partnerships. These technologies will enable providers to cater to diverse use cases and stay competitive in an increasingly digital landscape, ensuring they are well-equipped for future growth. These investments not only enhance client satisfaction but also pave the way for telecom providers to unlock new revenue streams. As industries digitalize, telecom providers should embrace these technologies in a strategic way to maintain relevance.

However, telecom providers should also become trusted advisors and partners to their clients. They should advise on the best solutions for specific requirements and operational setups, ensure that advanced technology solutions are ready for industrial deployment, and support clients in transitioning from current to new technologies in line with their business priorities and maturity.

Adopt edge computing and 5G

By investing in these innovations, telecom providers can deliver ultra-low latency services that are critical to time-sensitive applications across various sectors, such as manufacturing and healthcare. Edge computing, which involves processing data closer to source, rather than relying on distant cloud data centers, is crucial for applications that demand real-time responses. In sectors such as manufacturing, edge computing enables efficient automation of smart factories, predictive maintenance, and rapid operational decision-making, minimizing downtime and preserving competitive advantage.

5G networks, with their high-speed, low-latency capabilities, further enhance these benefits. In healthcare, 5G can facilitate real-time remote monitoring of patients, telemedicine, and even the use of AR in complex surgeries. In the automotive space, 5G has a prominent use case in connected mobility and autonomous vehicles.

Dean Rayne at BT Group says: *"One of the big emerging trends of the past few years is 5G. The next evolution of connectivity will see a coexistence of Wi-Fi and cellular connectivity, providing the speed and real-time data capacity needed to supplement existing offerings."*

The combination of advanced connectivity and distributed computing supports the growing demand for highly reliable IoT devices and data transmissions with quick processing times, making them essential for everything from intelligent industrial operations, autonomous vehicles to connected medical devices. Monika Gupta, Vice President at Capgemini, summarizes, *"By harnessing 5G's high bandwidth, low latency and coupling it with the distributed intelligence of edge computing, the industry is reshaping the operational backbone of modern enterprises. This synergy enables real-time insights, decision-making, enhances operational resilience, and paves the way for new and innovative wireless solutions in the B2B landscape."*

Use cloud-native architectures

With cloud-native approaches, services can be deployed and updated more rapidly than with legacy systems, fostering innovation and improving responsiveness to market demands. Cloud-native solutions offer greater flexibility, scalability, and agility, streamlining operations, reducing time-to-market for new services, and enhancing CX. Deutsche Telekom, for example, partnered with Ericsson and Google Cloud to develop an industry solution for a scalable and resilient cloud-native telecom network, which meets EU security and privacy requirements.[46]

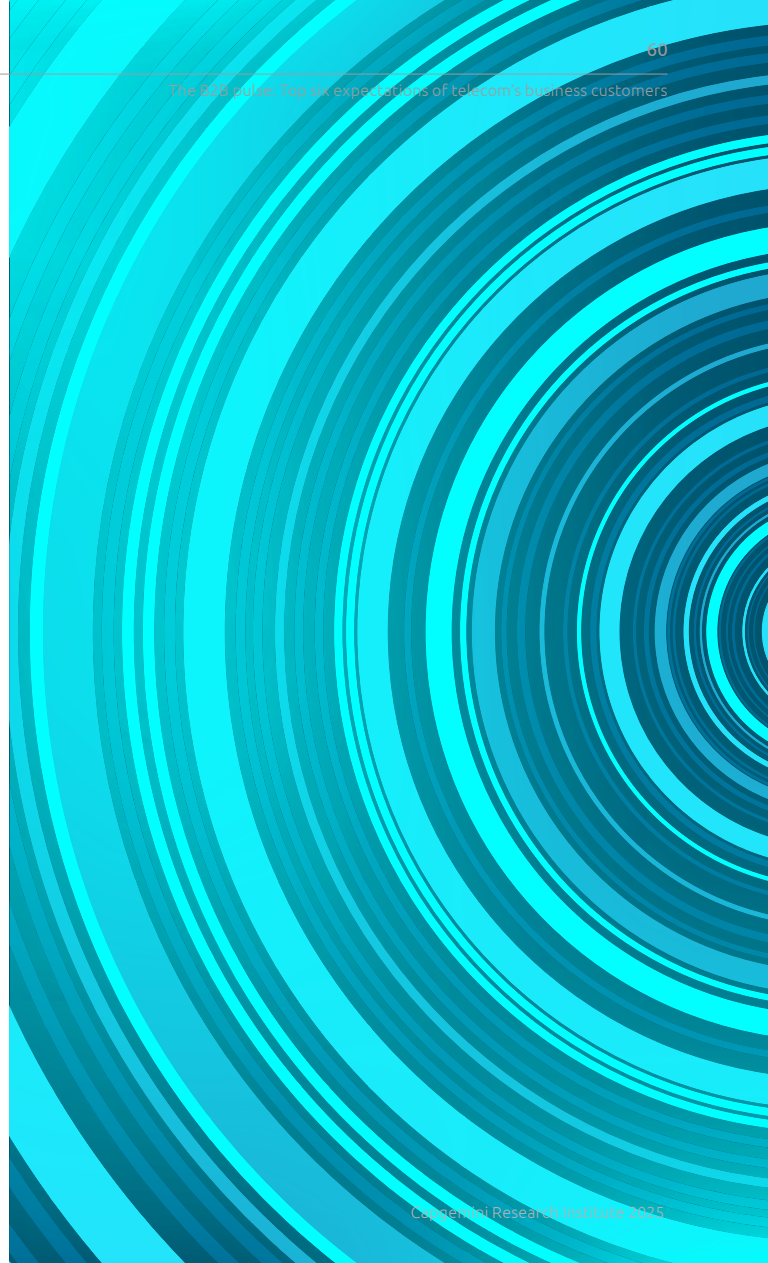
Strengthen virtualization

Virtualization refers to the process of decoupling network functions and services from dedicated hardware and running them on software-based platforms. Besides cost efficiencies, this provides greater flexibility and scalability to telecom providers. Our research found that organizations are planning to implement different types of virtualizations in the next 1–2 years.

Virtualized radio access network (vRAN) virtualizes the baseband processing functions of the RAN, enabling centralized processing and flexible management of radio network resources. This supports dynamic resource allocation, faster deployment, and reduces reliance on proprietary hardware. SoftBank, NEC, and Broadcom have all shown that it's possible to modernize mobile networks by using software to manage radio signals instead of relying on specialized hardware. They have successfully validated the virtualization of the RAN using open RAN (O-Ran) architecture and telco cloud. This joint effort demonstrates the feasibility of modernizing RAN systems to improve efficiency and scalability in network operations.[47] Similarly, Nokia partnered with a Finnish telecom operator, Elisa, to deploy Europe's first commercial 5G cloud radio access network (RAN) using Red Hat OpenShift.[48] The collaboration enables agile 5G networks with edge computing for faster AI/IoT services and scalable cloud-native infrastructure.

Use of new-age technologies such as Gen AI and hyperautomation

Telcos must also invest in hyperautomation by integrating AI, machine learning, and robotic process automation (RPA) to deliver better services. For instance, Vodafone Business partnered with EcoMT to launch TechYRoom for hospitality business.[49] TechYRoom is a Gen AI-powered cloud solution that combines IoT automation and voice control for smart industrial environments. This solution reduces manual interventions by streamlining the routine tasks of hotel maintenance technicians, receptionists, and cleaning staff. Similarly, AT&T is using Gen AI to optimize its network by analyzing documents and data to classify problems, enabling proactive issue identification and management, which helps them act swiftly even before an issue occurs.[50]



Prioritize operational excellence

Telecom providers should prioritize operational excellence to improve efficiency, reduce costs, and enhance customer satisfaction. Streamlining internal processes and adopting automation can lead to faster service delivery and issue resolution. By focusing on operational excellence, providers can optimize resource allocation, ensuring high-quality service without unnecessary overheads. This approach also enables better scalability, allowing telecom companies to adapt to growing demand while maintaining service consistency.

Automate core operations for efficiency

To remain competitive, telecom providers should embrace automation across their core processes to enable streamlining of complex tasks such as network management, billing, customer support, and service provisioning. Automation minimizes human errors, accelerates service delivery, and lowers operational costs.

For network management, AI offers predictive maintenance and automated troubleshooting. Furthermore, AI can analyze large volumes of data to predict demand, optimize resources, and improve network performance. AT&T Labs' AI-enabled automation innovations ensure optimal network and services operations using ML and predictive analytics to optimize CX; support efficient "auto-healing" of the network; optimally configure complex network environments; and ensure reliable network capacity.[51] Telefónica has integrated automation into its network slicing strategy to streamline operations and improve the management of network slices, which are virtualized network segments tailored for specific services or customers. By leveraging automation, Telefónica expects to reduce operational complexity, accelerate service deployment, and enhance the overall customer experience.[52]

Implement data analytics and agentic AI for decision-making

With advanced analytics, telecom organizations can optimize network resources, ensuring that capacity is allocated effectively according to demand patterns. Predictive analytics can help forecast network traffic and usage trends, allowing providers to scale infrastructure proactively and meet customer demand during peak periods. This data-driven approach can help telecom providers optimize resources and reduce operational costs. Sand Technologies offers AI and data analytics tools that assist in efficient resource management and anticipating future network needs.[53] Agentic AI can automate complex decision-making processes and provide real-time insights, thereby enabling more efficient network management, personalized customer experiences, and proactive issue resolution.

Commit to workforce upskilling

The skills required to manage complex networks, deliver innovative solutions, and enhance CX are becoming more specialized. Telecom providers must ensure their teams are equipped with the latest knowledge and technical expertise to navigate this shift. Upskilling efforts should focus on areas such as data analytics, cloud computing, AI, and cybersecurity, as these are critical to the future of telecom operations. Fostering digital literacy and collaboration skills will enable agile cross-functional environments.

Focusing on operational excellence allows telecommunications companies to create an operating model that promotes cross-department collaboration. This approach helps prevent fragmented or suboptimized solutions throughout the end-to-end customer journey.

Build resilience and sustainability right from the onset

For telecom operators, building resilience and sustainability is no longer a business imperative but a necessity to function in today's volatile environment. Here's how telecom providers can enhance their resilience and sustainability.

Strengthen cybersecurity defenses

As cyber threats become increasingly sophisticated, service providers must position themselves as security partners. The increasing interconnectivity and infrastructure sharing in telecom networks introduces a wide range of threats to the security of sensitive consumer data, jeopardizing customer trust. Telecom providers must offer industry-grade security solutions tailored to the risk profile of each sector. They must implement comprehensive security frameworks that include real-time threat detection, automated response systems, and advanced encryption protocols. They must establish a highly trained global incident response and management team that is available 24/7.

Alexandra Foster, former Managing Director at BT and now an independent consultant, comments: *"It's crucial to strengthen your data backup and recovery tools. Many industries collaborate on incident response and prevention, but it's essential to actively use AI to optimize the backup process and ensure swift recovery in case of data loss."*[54] Telcos need to continuously reassess security landscape and risks, establish framework, policies, and guidelines, safeguard business processes, and cultivate a culture of risk awareness. For example, Vodafone's proactive risk management strategies include regular security audits and updates to address emerging threats.

Adopt green technologies

Two in three organizations in our study want their telecom providers to demonstrate strong commitment to sustainability and environmentally friendly practices. Further, 56% say alignment with their organization's sustainability and CSR goals is very important for organizational growth. However, only 39% are satisfied with their service provider's current level of commitment. Telecom providers must implement renewable energy sources and energy-efficient network designs to minimize carbon footprints and help integrate their offerings more effectively.

Noting the interdependencies in achieving greenhouse gas (GHG) emission reduction goals of both companies, Orange Business and Cisco have signed a memorandum of understanding (MoU) with a joint action plan to help reduce their emissions. This MoU will facilitate data sharing, allowing both organizations to measure emissions across their shared portfolio.[55]

Implementing smart grids and renewable energy systems can reduce power use and carbon emissions. Rajat Arora, Senior Director, Strategy and Transformation, at PepsiCo, says: *"We've prioritized sustainable network design, especially within our data centers, and are actively implementing advanced technologies to enhance security. We believe that leveraging automation is crucial for operational efficiency, and are committed to modernizing our infrastructure to meet future demands. Just as advanced AI is transforming industries, we see these strategic initiatives as vital for building a robust and adaptable network."* Organizations today want service providers that align with their goals and offer value to their sustainability objectives. Telecom providers need to work on innovating footprint-reducing technologies that can integrate well with the existing systems.

Prepare proactively for crisis

In the face of disruptions such as natural disasters, data outages, system failures, and the increasing incidence of cyberattacks, telecom providers must develop a robust crisis management plan that includes disaster recovery and business continuity. In September 2024 a severe cyberattack ("Salt Typhoon") compromised many US telecom systems and the sensitive data they carried.[56] Similarly, a large US-based telecom company experienced a massive data breach in March 2024 that impacted almost 73 million customers.[57] Telecom providers should adopt robust data protection and recovery practices, employing advanced technologies to continuously monitor, mitigate risks, report incidents, and minimize downtime. They should involve stakeholders from the outset, with regular drills and transparent testing. Crafting an effective business continuity plan will provide an edge over competitors, reduce financial losses incurred during disruptions, cultivate stakeholder confidence, and ensure regulatory compliance.

"By harnessing 5G's high bandwidth, low latency and coupling it with the distributed intelligence of edge computing, the industry is reshaping the operational backbone of modern enterprises. This synergy enables real-time insights, decision-making, enhances operational resilience, and paves the way for new and innovative wireless solutions in the B2B landscape."

Monika Gupta
Vice President,
Capgemini

Conclusion

Telecom providers must move beyond basic connectivity – business customers demand tailored, end-to-end solutions that drive digitalization, efficiency, and growth. They expect telecom partners who deeply understand their industry and can address unique challenges with flexible, outcome-driven solutions.

Yet, telecom providers are falling short. Only one in three organizations is satisfied with SLA compliance and network performance/reliability – both critical to business continuity and cybersecurity. This signals an urgent need for structural improvements and service innovation.

Business customers are shifting toward bundled services, data analytics, managed cloud solutions, and ecosystem collaboration to streamline operations and enhance efficiency. Telecom providers must respond by simplifying solutions, enhancing cybersecurity, and fostering seamless ecosystem integration to remain relevant.

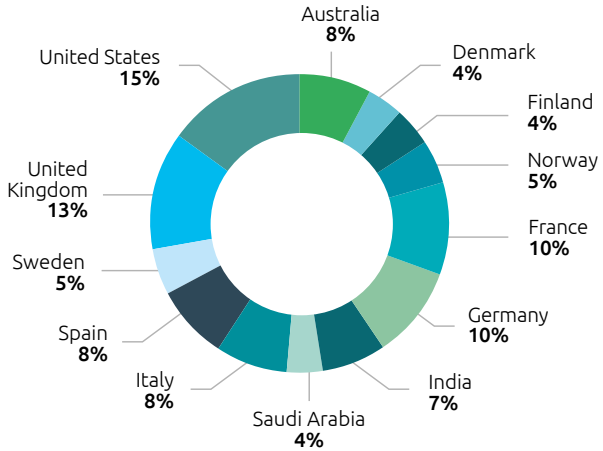
The opportunity is clear: Telecom providers that embrace innovation, prioritize CX, and deliver sector-specific solutions will secure long-term, high-value relationships. Now is the time to lead the digital transformation of business customers – not just support it.

Research methodology

The research methodology is structured in two parts.

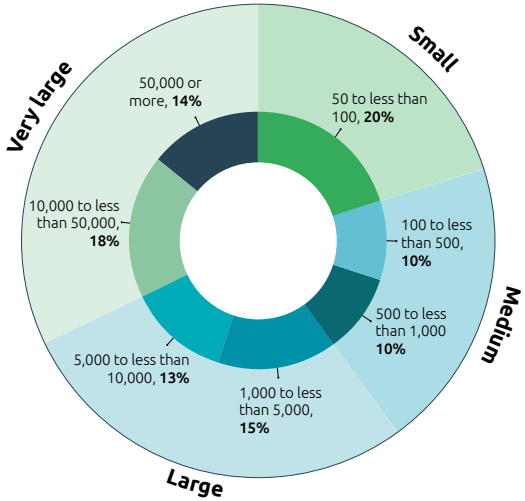
1. We surveyed 1,000 executives at director level or above, from business customers across 13 countries in Europe, North America, and Asia-Pacific. We carried out a global survey in December 2024 and January 2025. We provide the distribution of these respondents and their organizations below.

Organizations by location of headquarters



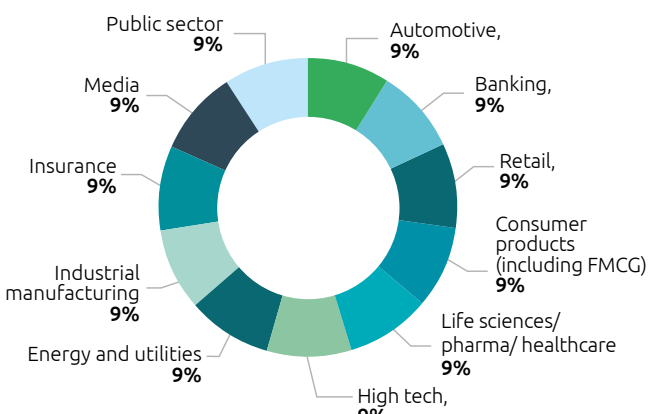
Source: Capgemini Research Institute, Telco business customers survey, December 2024–January 2025, N = 1,000 organizations.

Organizations by number of employees



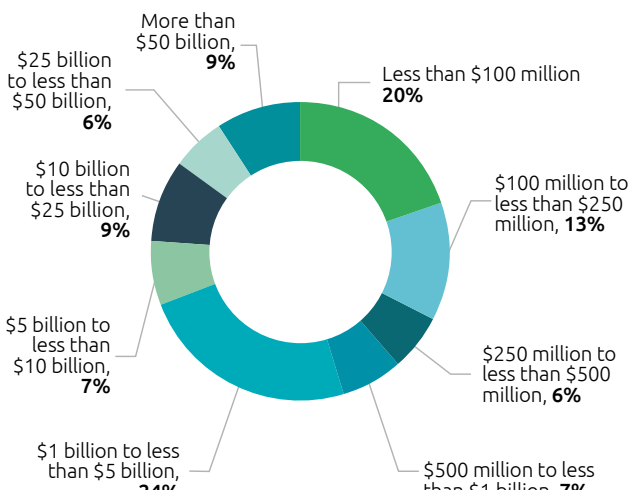
Source: Capgemini Research Institute, Telco business customers survey, December 2024–January 2025, N = 1,000 organizations.

Organizations by industry



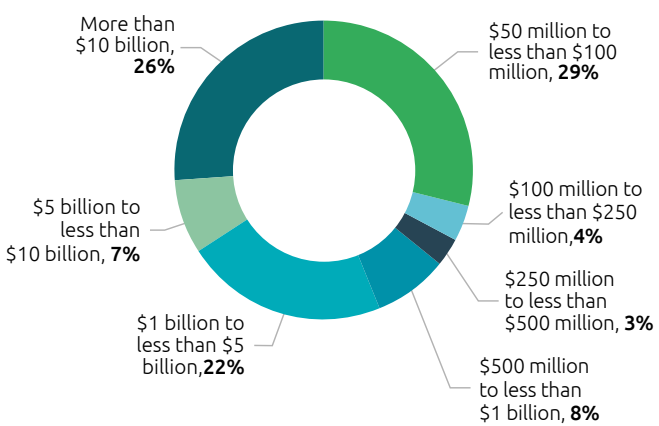
Source: Capgemini Research Institute, Telco business customers survey, December 2024–January 2025, N = 1,000 organizations.

Organizations by revenue (excl. public sector)



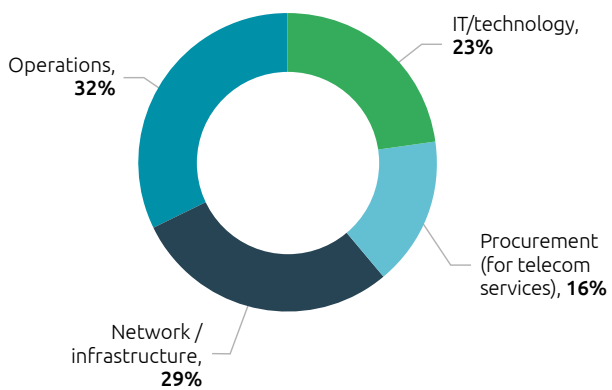
Source: Capgemini Research Institute, Telco business customers survey, December 2024–January 2025, N = 910 organizations excluding public sector.

Public sector organizations by annual budget



Source: Capgemini Research Institute, Telco business customers survey, December 2024–January 2025, N = 90 public sector organizations.

Executives by function



Source: Capgemini Research Institute, Telco business customers survey, December 2024–January 2025, N = 1,000 organizations.

2. To complement the survey findings, we conducted in-depth discussions with 20 executives from the customer industries and the telecom industry.

The study findings reflect the views of the respondents to our online questionnaire for this research and are intended to provide directional guidance. Please contact one of the Capgemini experts listed at the end of the report to discuss specific implications.

References

1. Spiceworks blog, "Future trends of AI-driven network optimization," April 2024.
2. Vodafone Business Marketplace UK. (n.d.). Vodafone Business Marketplace UK | Vodafone. Retrieved January 20, 2025, from https://marketplace.vodafone.co.uk/en-GB/home
3. Salesforce webinar, "Improving sales efficiency and customer experience - a transformational journey in the telco industry," January 2025.
4. Capgemini Sweden, B2B Digital Telco Operator Observatory: Real-world stories of operators who are embracing digital technology to transform. December 12, 2022. https://www.capgemini.com/se-en/insights/research-library/b2b-digital-telco-operator-observatory/
5. GSMA Intelligence, "Telcos eye $400bn enterprise opportunity," October 2024.
6. Ericsson, "Ericsson launches Service Orchestration and Assurance to fuel CSP innovation," February 2024.
7. elefónica, "We partner with Siemens to boost industrial digitalization," January 2025.
8. Computerweekly.com, "Verizon and Skylo team for satellite-based IoT and messaging," September 2024.
9. The Fast Mode, "Mavenir, Ice Norway partner to launch 5G network slicing for military & public safety," October 2024.
10. Orange, "An industrial maintenance solution combining AI, a 5G private network and IoT," November 2024.
11. GSMA, "What is GSMA Open Gateway?"
12. TelecomTV, "Ericsson and Orange Belgium complete groundbreaking 5G slicing automation project," November 2024.
13. Capgemini, "Schneider Electric and Capgemini collaborate to accelerate 5G industrial automation, supported by Qualcomm," February 2023.
14. Private LTE and 5G, "Tesla Launches Private 5G Network at Gigafactory in Berlin," May 9, 2024.
15. T-Mobile USA - Microsoft 365 for Enterprise: Implementation. (n.d.). Retrieved January 21, 2025, from https://appsource.microsoft.com/en-us/marketplace/consulting-services/sprint1616187211360.microsoft365e
16. BT Business. (n.d.). BT Cloud Work Unified Communications, provided by RingCentral. Retrieved January 21, 2025, from https://business.bt.com/digital-workplace/cloud-collaboration/cloud-work-ringcentral/
17. Telkomsel Enterprise, "Telkomsel MSIGHT: Empowering Business Growth with Actionable Insights from Telco Big Data."
18. Vodafone, Vodafone Analytics. (n.d.). Retrieved January 22, 2025, from https://www.vodafone.com/business/products/cloud-and-edge/cloud-services/analytics-and-insights/vodafone-analytics
19. Telstra, Annual report 2024.
20. Capgemini, "Capgemini and Orange are pleased to announce the launch of commercial activities of Bleu, their future 'cloud de confiance' platform," January 15, 2024.
21. Sovereign Cloud powered by Google Cloud. (n.d.). Retrieved January 22, 2025, from https://www.t-systems.com/in/en/sovereign-cloud/solutions/sovereign-cloud-powered-by-google-cloud.

22. GlobeNewswire blog, "Telenor Group strengthens and expands its strategic collaboration with AWS to support its sovereign cloud posture," June 2024.
23. Capgemini Research Institute, Generative AI in cybersecurity, November 2024.
24. Airtel, "Airtel Business partners with Fortinet, launches 'Airtel Secure Internet,'" October 2024.
25. Orange Business, "watchTowr Partners with Orange to Redefine External Attack Surface Management for Strategic Enterprise Customers," October 2024.
26. Vodafone, "Vodafone Business launches cybersecurity platform to help SM&Es reduce human cyber risk," October 2024.
27. Google Cloud, "Advancing the art of AI-driven security with Google Cloud," May 6, 2024.
28. Gartner, "Gartner forecasts global information security spending to grow 15% in 2025," August 2024.
29. BBVA, "BBVA signs an agreement with Telefónica Tech to boost cybersecurity on a global scale," July 2024.
30. Cyber Magazine, "BT's Security Chief: Why AI Poses Such a Risk to Security," January 2025.
31. Cointelegraph, "Microsoft partners with Vodafone on generative AI integration," January 17, 2024.
32. We helped Virgin Money improve customer acquisition. Telefónica Tech. (n.d.). Retrieved January 23, 2025, from https://telefonicatech.com/en/successstories/virgin-money-business-apps.
33. AT&T Blog, "AT&T expanding AI across the company to support and empower our employees," September 7, 2023.
34. Telstra Connect Services by Telstra Enterprise. Telstra Enterprise. (n.d.) Retrieved January 23, 2025, from https://www.telstra.com.au/business-enterprise/self-service/telstra-connect.
35. Ensuring 24/7 future-proof car connectivity. Thales. (n.d.) Retrieved January 21, 2025, from https://www.thalesgroup.com/en/markets/digital-identity-and-security/iot/industries/automotive/connect-cars.
36. Commercetools, "How telecom leaders can win in the B2B market," 2024.
37. BT, "What is NaaS?" May 2024.
38. Deutsche Telekom, "AI for everyone – Perplexity now under "Magenta AI" in the MeinMagenta app," November 2024.
39. Maxis, "Malaysia retail chain association collaborates with Maxis to drive 5G technology adoption in the retail sector," October 2024.
40. Telecom, "China mobile CMIOT collaborates with Huawei to enable thousands of industries and drive intelligent connectivity of everything," October 2024.
41. TMForum.org, "A week in telecoms: Major telcos and Ericsson create network API joint venture," September 2024.

42. Nokia, "Nokia launches industry's most modern data center automation platform built for the AI era," September 2024.
43. TelecomTV, "MásMóvil sees 5G virtue in Singtel's Paragon," February 2024.
44. Telecoms.com, "The partner ecosystem management conundrum," September 2024; Docomo, FY2023 Financial Results and FY2024 Guidance, May 2024.
45. The Fast Mode, "Deutsche Telekom Intros 'World's First' 5G+ Gaming Offer based on Network Slicing," August 2024.
46. Deutsche Telekom blog, "Deutsche Telekom, Google Cloud, and Ericsson demonstrate network transformation milestone with 5G cloud-native network pilot," February 2023.
47. SoftBank, "SoftBank Corp., NEC and Broadcom jointly validate RAN modernization with virtualization by unifying O-RAN architecture and Telco Cloud," February 28, 2024.
48. Nokia, "Nokia and Elisa deploy Europe's first commercial 5G Cloud RAN deployment with Red Hat OpenShift," December 2024.
49. Vodafone, "Vodafone uses Generative AI to transform the hotel experience," February 2024.
50. Mobile World Live, "Feature: How GenAI is transforming AT&T," December 2023
51. AT&T Labs blog, Analytics and AI-based automation. (n.d.). Retrieved January 22, 2025, from https://about.att.com/sites/labs/our-work/analytics-ai-automation.
52. TelcoTitans, "Telefónica injects automation into network slicing strategy," June 27, 2024.
53. Sand Technologies blog, "The future of telecom network planning with AI," September 2024.
54. Capgemini Research Institute, "New defenses, new threats: What AI and Gen AI bring to cybersecurity," November 2024.
55. Orange Business, "Orange Business and Cisco sign first-of-its-kind MoU to accelerate GHG emissions reduction and support net zero goals," February 2024.
56. Cyber magazine, "Examining the 'worst' telco cyber attack in US history," November 2024.
57. Sprinto, "When crisis strikes, be ready: Creating a business continuity policy that works," January 2025.

Authors

Meet the experts

Praveen Shankar
EVP, Global industry leader for Telecom, Capgemini
praveen.shankar@capgemini.com

Praveen Shankar, the Global Head of Telecommunications at Capgemini, is a distinguished leader with over 20 years of experience in the telecom industry. He has been instrumental in driving digital transformation and innovation within the telecom sector. In his previous role, he led major transformation programs, and helped clients navigate challenges related to emerging technologies and market disruptions. Praveen's expertise spans large-scale technology companies, delivering substantial business value through strategic initiatives. He holds an MBA from the University of Cambridge.

Aurélie LESOUEF
VP, Telecom, Media and Technology, Capgemini Invent
aurelie.lesouef@capgemini.com

Aurélie has been involved in major B2B transformations for various Telcos and ICT players around the world where she has been promoting innovative value proposals along with best-in-class experiences for both employees and customers. She is bringing a value-driven transformative outlook to these journeys, acting as a true business partner to our customers.

Frédéric Vander Sande
VP, Head of Telecom for Europe, Capgemini Invent
frederic.vandersande@capgemini.com

Frédéric is European Head of Telecoms for Capgemini Invent. He brings over 20 years of experience in advising senior leaders on strategy, commercial, operations, and technology questions in the TMT industries. His areas of expertise are in business planning, transformation, commercial strategy or the launch of new businesses, products & services. Some of his recent work addresses telecom sustainable future challenges, radical simplification as well as digital identity developments.

Monika Gupta
VP, Global Connectivity, 5G & Edge lead for Industries and Alliances, Capgemini
monika.i.gupta@capgemini.com

Monika Gupta is the global Connectivity, 5G & Edge expert for industries and alliances at Capgemini. She works with industry clients on how they can adopt advanced connectivity, compute and related technologies for their data-driven digital transformation. She is currently based in the USA focused on Capgemini's go-to-market for the Americas region. She also works as an advisor with Government of India on 5G/6G initiatives.

She has 30 years of experience in the Telecommunications industry. Prior to joining Capgemini, she has held leadership positions with reputed organizations like Bharti Airtel, Ericsson and Nokia Siemens across the globe.

Guillermo Pedraja
VP, Head of Telecom, Media, Technology and Services, UK, Capgemini Invent
guillermo.pedraja@capgemini.com

Guillermo Pedraja is a Vice President at Capgemini Invent, where he leads the business and technology transformation unit for clients in the Telecommunications, Media, Technology and Services sectors. With extensive experience in strategy and transformation, Guillermo is passionate about driving the next wave of innovation and growth, leveraging technology, people and partnerships, across multi-industry engagements.

Authors

Meet the Capgemini Research Institute

Jerome Buvat
Head of the Capgemini Research Institute
jerome.buvat@capgemini.com

Jerome is the head of the Capgemini Research Institute. He works closely with industry leaders and academics to help organizations understand the business impact of emerging technologies.

Ramya Krishna Puttur
Associate Director, Capgemini Research Institute
ramya.puttur@capgemini.com

Ramya has over twelve years of experience in consulting and digital transformation and is an Indian Institute of Technology alumnus with gold medals at both post-graduation and under-graduation levels. She has co-authored numerous publications for the Capgemini Research Institute on the impact of digital technologies across industries and developed proprietary tools for assessing clients' data and digital maturity.

Navya Atmakuri
Senior Consultant, Capgemini Research Institute
Navya.atmakuri@capgemini.com

Navya is a research consultant at the Capgemini Research Institute. She is passionate about sustainability and works closely with industry leaders and academics to drive impactful research and innovative solutions.

The authors would like to thank the following people for their contributions to the research:

Karl Bjurstroem	Executive Vice President, Global Head of Tech and Telco industries, Capgemini Invent
Arun P Santhanam	Executive vice president, ABL AMERICAS, Capgemini
Darshan Naik	Executive Vice President, Chief Growth Officer, TMT, Capgemini
Stanislas de Roys	Executive Vice President, Capgemini
Andreas Markdalen	Vice President, Frog, Capgemini Invent
Jacques Assaraf	Vice President, Capgemini
Habib Melhem	Vice President, Head of TMT, Sweden and Finland, Capgemini Invent
Ashish Julka	Vice President DSP, Capgemini
Johannes Aasheim	Vice President, Norway, Capgemini
Alessandro Puglia	Vice President, Italy, Capgemini
Anne-Laure CADENE	Vice President, Head of University Partnerships, Capgemini
Chris Wilhelm	Vice President, Capgemini Invent
Jose Ignacio Garcia Lopez	Group Client Delivery Partner, Capgemini
Alexandre Mavraganis	Delivery Director, France, Capgemini
Ian Middleton	Senior Director, Capgemini Invent
Amit Joshi	Senior Director, Capgemini Invent
Maarten Deceuninck	Director, Capgemini Invent
Ragupathy V	Program Manager, Capgemini
Andy Tiley	Global Category Manager, Capgemini
Fernando Del Puerto Pacheco	Procurement Manager, Capgemini
Ilafe El Aouazi	Managing Consultant, Capgemini Invent
Subrahmanyam KVJ	Senior Director, Capgemini Research Institute
Tvishee Kumar	Senior Manager, Capgemini Research Institute
Sroddha Patra	Senior Consultant, Capgemini Research Institute
Venkata Meenakshi Garima Gopi	Manager, Capgemini

The authors would like to thank all the industry executives who participated in this research. They would also like to thank Julia von Both, Punam Chavan, Jaydeep Neogi and Amitabha Dutta for their contributions to the research.

Partner with Capgemini

Capgemini is the telco industry's **partner for growth**.

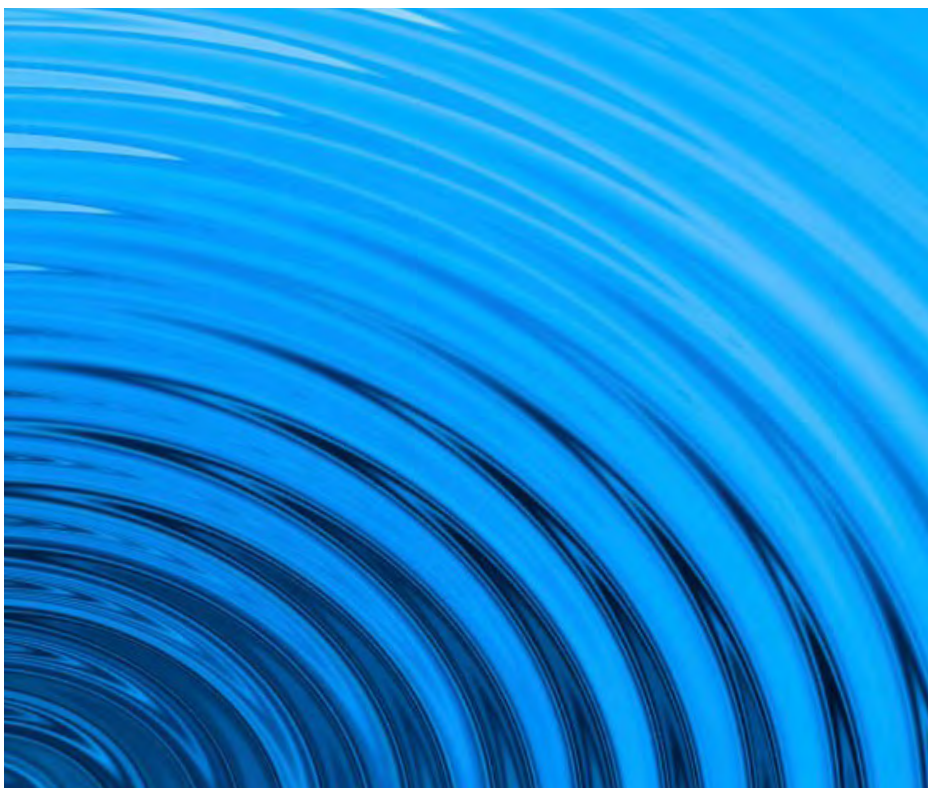
We serve as a **global, end-to-end service provider,** a **pragmatic innovator** and **ecosystem orchestrator** that approaches every project with the goal of delivering **tangible outcomes and clear business value** to our clients.

Our unique blend of capabilities and expertise allows us to take an approach that is both **data-driven** and **human-centric**, enabling us to help our clients solve complex business and technology problems through **leading-edge digital solutions**, including AI and gen AI, best-in-class **engineering capabilities**, an extensive **partnership network** and **culture of collaboration**.

The telecom sector is at a critical juncture: On one hand, telecoms are the backbone of every industry, providing the critical infrastructure that drives our digital economy. At the same time, growth within the sector has become elusive, despite massive investments in 5G and fiber networks. As costs continue to rise and non-traditional players infiltrate the landscape, telecom companies must find the courage to reinvent their business and reimagine the role they want to play in the world.

It is in this context that we've launched **Reimagining telecom industry**, an exciting podcast series created in collaboration with **Cloud Realities**, ranked in the top 1% podcasts on global platforms. This 5-episode features some of the brightest minds of the industry, gathering their perspectives on the areas of simplification, data and AI, growth, network transformation, and regulation.

Make sure you listen in and follow us: Reimagining the telecom industry - Capgemini



For more information, please contact:

Global

Praveen Shankar
Global Telecom Leader, Capgemini
praveen.shankar@capgemini.com

Karl Bjurstroem
Global TMT Lead, Capgemini Invent
karl.bjurstrom@capgemini.com

Anne-Flore AGARD
Global Telecom Lead, Capgemini Engineering
anne-flore.agard@capgemini.com

Pierre FORTIER
Group 5G and Advanced Connectivity Lead, Capgemini
pierre.fortier@capgemini.com

Regional

APAC
Wendy Koh
Executive Vice President, Southeast Asia
wendy.koh@capgemini.com

France
Philippe FORTES
Vice President
philippe.fortes@capgemini.com

Germany
Florian Schwarz
Vice President, Germany, Capgemini
florian.schwarz@capgemini.com

Italy
Gea Smith
Vice President
gea.smith@capgemini.com

Nordics
Sanjay Beloshe
Vice President
sanjay.beloshe@capgemini.com

Spain
Ana Belen Mosquera González
Executive Vice President
ana.mosquera@capgemini.com

United Kingdom
Ash Pandey
Vice President
ash.pandey1@capgemini.com

United States
Arun P Santhanam
Executive Vice President
arun.santhanam@capgemini.com

More Capgemini Research Institute publications

New defenses, new threats: What AI and Gen AI bring to cybersecurity

Autonomous networks

Top Tech Trends of 2025

Investment priorities for 2025

Reindustrialization of Europe and the US

Gen AI in Software

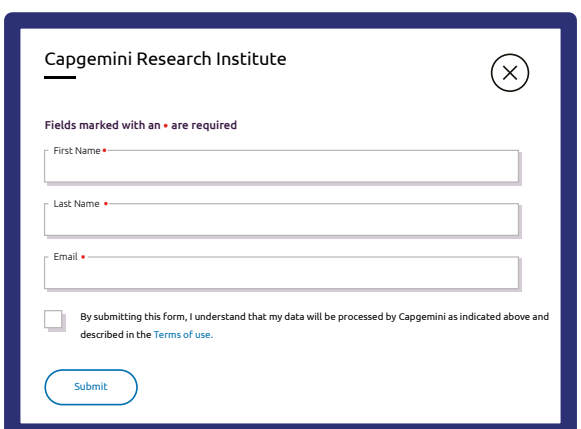
The Eco-Digital Era™: The dual transition to a sustainable and digital economy

Digital twins: Adding intelligence to the real world

Conversations for Tomorrow #9: Generative AI

Subscribe to latest research from the Capgemini Research Institute

Receive copies of our reports by scanning the QR code or visiting
https://www.capgemini.com/capgemini-research-institute-subscription/



Notes

Notes

About Capgemini

Capgemini is a global business and technology transformation partner, helping organizations to accelerate their dual transition to a digital and sustainable world, while creating tangible impact for enterprises and society. It is a responsible and diverse group of 340,000 team members in more than 50 countries. With its strong over 55-year heritage, Capgemini is trusted by its clients to unlock the value of technology to address the entire breadth of their business needs. It delivers end-to-end services and solutions leveraging strengths from strategy and design to engineering, all fueled by its market leading capabilities in AI, generative AI, cloud and data, combined with its deep industry expertise and partner ecosystem. The Group reported 2024 global revenues of €22.1 billion.

Get the Future You Want | **www.capgemini.com**