

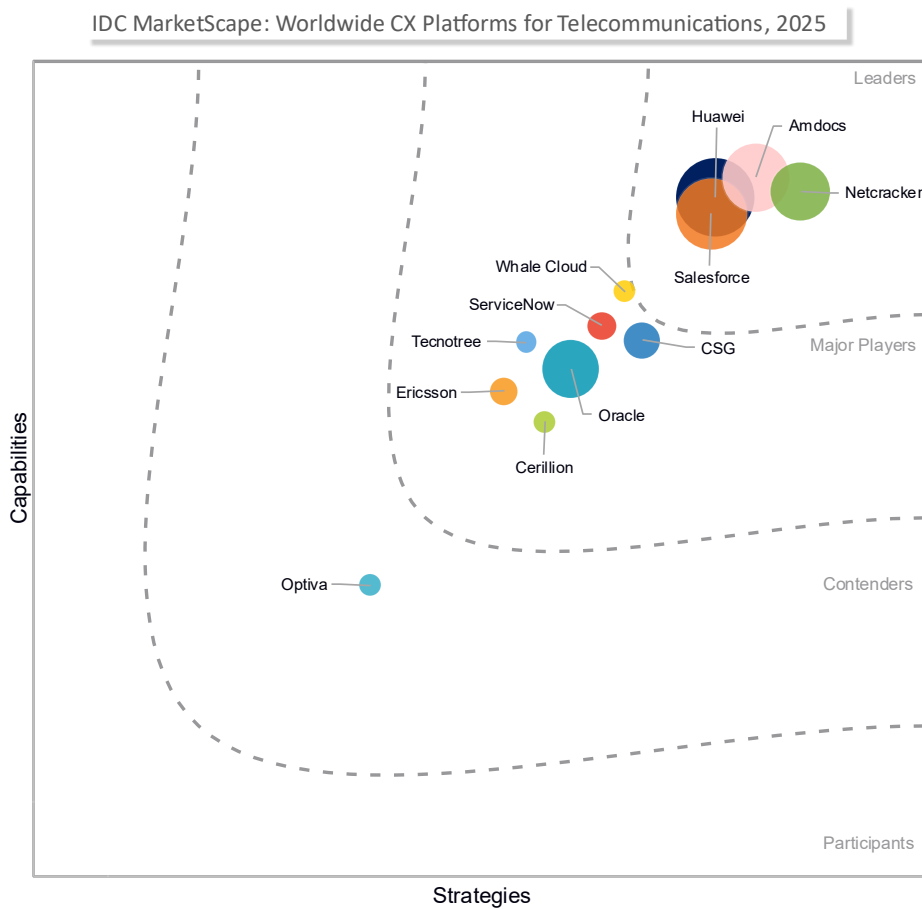
IDC MarketScape: Worldwide Customer Experience Platforms for Telecommunications 2025 Vendor Assessment

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THIS EXCERPT FEATURES AMDOCS AS A LEADER
IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape: Worldwide Customer Experience Platforms for Telecommunications 2025 Vendor Assessment



Source: IDC, 2025

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

IDC OPINION

The telecom industry is at a crossroads. Basic connectivity is seen as a utility with limited room for differentiation. Telcos must choose between doubling down as utility providers or evolving into providers of a broad range of digital services. Regardless of the path they choose, both strategies demand that telcos fundamentally overhaul the experience they offer customers.

According to IDC's latest *Telco Cloudification and Digital Transformation Survey*, improving customer experience (CX) is telcos' number 1 digital transformation investment. Central to many of these efforts are CX platforms, which support holistic management of the capabilities required to deliver a differentiated customer experience. These platforms must deliver advanced functionalities such as omni-channel engagement capabilities as well as seamless customer interactions across channels, including voice, SMS, social media, and chat. Leveraging AI and analytics is a core requirement and significant differentiator between suppliers. Common AI-driven features include predictive analytics, chatbots, and sentiment analysis, which empower providers to enhance service delivery and offer highly personalized customer experiences. Key components also include customer journey mapping tools to visualize and optimize touchpoints and real-time interaction management to boost responsiveness and satisfaction. Mechanisms for gathering and acting on customer feedback, as well as robust self-service options through intuitive portals and mobile apps, are vital for driving efficiency and continuous improvement in customer engagement.

Telecoms is a mature industry with a myriad of specialized systems. Vendor integration with telecom-specific systems such as billing, CRM, and OSS/BSS platforms is imperative to ensure a cohesive approach to customer management. It is also a differentiator, which makes it more difficult for vendors without long experience in the industry to make an impact.

IDC MARKETSCOPE VENDOR INCLUSION CRITERIA

While IDC strives to include as many relevant vendors as possible, no market study can be entirely comprehensive. Additionally, given the nature of the telecom BSS market and the wider customer experience ecosystem, many players have partial solutions, play strongly within a limited geography, or provide enterprise CX solution offerings that are not verticalized for telecoms. To ensure a valuable decision-making tool, IDC will prioritize vendors that meet the following criteria:

- **Product portfolio completeness.** Vendors should have a strong range of customer experience product capabilities, typically including CRM, journey

orchestration, campaign management, omni-channel management, and customer care platform functionality, which are deployed with telecom customers.

- **Customer relevance.** Vendors must have a significant number of telecom clients and must be supporting these clients across a majority of regions.
- **Industry recognition.** Based on input from industry peers, publications, agencies, end-user brands, and revenue analysis, IDC analysts must determine that vendors are active players.

ADVICE FOR TECHNOLOGY BUYERS

Customer experience is no longer the responsibility of only one department or job function. It requires holistic cross-functional direction to deliver the unified, transparent, and smooth experiences that customers expect in consumer and B2B interactions. With a fragmented legacy IT estate, it is unlikely that any one CX platform provider will fulfill every function, at least initially. AI is also changing the game with a range of AI features enhancing vendor solutions, but realizing its full value requires operators to adopt new skills and mindsets. This complex mandate and the evolving environment mean telcos should carefully consider the following factors when procuring CX platform solutions:

- **Organizational alignment and oversight.** Pick partners that will be a strong organizational fit and that can support and enhance your vision for customer experience. Many suppliers have capabilities underutilized by telcos today. Organizational alignment on how to utilize the greatest range of value adding capabilities from vendors is crucial to enabling competitive differentiation, without creating financial and integration costs through customization.
- **AI road map.** AI capabilities from all suppliers are developing at pace. Today generative AI (GenAI) is being scaled. With agentic AI models evolving, buyers must think ahead. They should evaluate vendors based on their generative and agentic AI capabilities and the speed at which their solution and services enables customers to operationalize that road map.
- **Integration and interoperability.** Telcos are generally large organizations with complex, multisystem environments; seamless integration is critical. Vendors should demonstrate robust real-world interoperability with telecom-specific systems and compliance with telecom standards such as TM Forum APIs. This capability is even more crucial for maximizing value from AI-driven analytics and self-service capabilities, which will need access to diverse data sets.
- **Rigorous AI governance.** Vendors should support enterprise-grade governance and data security capabilities, including audit trails, explainability, and compliance with global data privacy standards. Observability will be critical to the safe operation of increasingly autonomous agents.

- **Change management and user adoption.** The increasing use of AI tools in customer experience will disrupt established processes and roles. Telcos should develop a comprehensive change management plan that includes executive sponsorship, user training, and continuous feedback loops. Ensure that the vendor offers robust onboarding resources and collaborates on adoption strategies tailored to telecom environments.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and opportunities.

Amdocs

Amdocs is positioned in the Leaders category for this 2025 IDC MarketScape for worldwide CX platform vendors for telecommunications.

Amdocs, headquartered in Chesterfield, Missouri, has been serving the telecom market for over 40 years. Amdocs operates in 90 countries across all major regions, including North and South America, EMEA, Asia, and Australia.

Amdocs has decades of experience supporting communications service providers (CSPs) worldwide and has more than 29,000 employees. Amdocs has maintained a strong track record of profitability and strategic partnerships, including a key alliance established with Microsoft in 2019. Building on this, Amdocs and Microsoft launched the Customer Engagement Platform, a co-engineered, telco-specific solution that integrates Amdocs' telecom-grade capabilities with Microsoft Cloud and Dynamics to serve both B2C and B2B segments, in 2023.

Its modular, cloud-native, API-first, and composable architecture empowers business users with configuration-led tools and intuitive low-code interfaces. The platform is designed to meet the complex needs of telecom operators. This includes the intricacies of B2B sales journeys, where large-scale quotes, complex pricing, multilayered approval cycles, and post-contract changes are standard. The platform is supported by the Amdocs amAIz GenAI suite, delivering telecom-specific AI agents that proactively automate, personalize, and orchestrate experiences in real time, across all customer and employee journeys, alongside Microsoft Copilot for Sales and Microsoft Copilot for Service.

Strengths

Amdocs brings decades of telecom expertise and a purpose-built, telco-specific platform that is tailored for complex CSP customer journeys across B2C and B2B. Its deep vertical specialization is evident in features such as automated contract life-cycle management; move, add, change, and disconnect (MACD); billing care;

effective in-flight order handling (PONR); embedded profit and loss analysis; and seamless integration of Microsoft Copilot for sales productivity. Pre-integration with Microsoft 365 and Teams supports streamlined operations across marketing, sales, and service. The platform's modular and composable design supports AI-infused capabilities such as predictive configure-price-quote (CPQ), embedded journey orchestration (which enables cohesive engagement), and opportunity scoring to enhance conversion and shorten sales cycles. Amdocs' innovation, global footprint, and robust enterprise partnerships position it as a trusted enabler of next-gen monetization models.

Challenges

While Amdocs offers a highly sophisticated and telco-specific CX solution that serves diverse CSPs, its scale and complexity can challenge smaller operators without mature IT infrastructures or agile transformation strategies. As the Amdocs–Microsoft partnership evolves, maintaining alignment on strategy and product will be critical to ensuring continued customer value.

Consider Amdocs When

Consider Amdocs if you are a telecom operator with complex requirements for modernizing your B2C customer experience, or if you have ambitious B2B growth objectives requiring a telco-specialized, end-to-end engagement platform. Purpose-built for telecom, Amdocs' end-to-end platform is well suited for transforming customer journeys, launching converged offerings, and scaling AI-driven engagement to drive growth. Its extensive telco heritage and integration with Microsoft tools make it a strong partner for complex, revenue-driven digital transformation.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis or strategies axis indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about

offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represent the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores — and ultimately vendor positions on the IDC MarketScape — on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

This IDC MarketScape focuses on the global market for customer experience (CX) platforms that encompasses solutions specifically tailored to meet the unique customer experience challenges of the telecom sector. These platforms must deliver advanced functionalities such as omni-channel engagement capabilities and enable seamless customer interactions across channels, including voice, SMS, social media, and chat. Leveraging AI and analytics is a core requirement, with features such as predictive analytics, AI-driven chatbots, and sentiment analysis empowering providers to enhance service delivery and offer highly personalized customer experiences. Key components also include customer journey mapping tools to visualize and optimize touchpoints, alongside real-time interaction management to boost responsiveness and satisfaction. Integration with telecom-specific systems such as billing, CRM, and OSS/BSS is imperative, ensuring a cohesive approach to customer management. Additionally, mechanisms for gathering and acting on customer feedback, as well as robust self-service options through intuitive portals and mobile apps, are vital for driving efficiency and continuous improvement in customer engagement.

LEARN MORE

Related Research

- *Worldwide Telco Operations and Monetization Solution Forecast, 2025–2029* (IDC #US52330725, July 2025)

- *IDC's 2025 Worldwide Telecommunications Digital Transformation Taxonomy and Use Case* (IDC #US53685825, July 2025)
- *Telecoms AI Agents: Build or Buy?* (IDC #US52330525, July 2025)
- *Market Analysis Perspective: IDC Telecommunications Insights — Europe, Middle East, and Africa Business Models and Technology Transformation, 2025* (IDC #EUR152276025, June 2025)
- *The Telecom Billing Transformation Landscape in the Age of AI* (IDC #EUR152887425, May 2025)
- *MWC25: Telco Transformation and Monetization in EMEA* (IDC #EUR153262125, April 2025)
- *GenAI, Agentic AI, and the Shift from Assist to Action* (IDC #US53246423, March 2025)

Synopsis

The IDC MarketScape assesses worldwide customer experience (CX) platforms for the telecommunications sector and discusses what criteria are most important for companies to consider when selecting a vendor. It highlights the critical role of AI-driven tools, omni-channel capabilities, and seamless integration with telecom-specific systems such as CRM and OSS/BSS. Vendors are assessed on their ability to support personalized experiences, operational efficiency, AI capabilities, and strategic alignment with evolving telco needs. This report provides actionable insights for technology buyers to navigate complex CX platform procurement and adoption challenges.

"For telecom operators, customer experience is critical for brand differentiation and essential for staying competitive and relevant in a market where B2C and B2B choices are numerous and basic connectivity is commoditized. Achieving differentiation requires selecting a CX solution that offers advanced features tailored to the telecommunications industry and aligns closely with the organization's structure and customer experience vision," said Ahmad Latif Ali, associate VP at IDC.

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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