konecta

20 25 | COMPANY OF THE YEAR

Driving impact across the customer value chain

RECOGNIZED FOR BEST PRACTICES IN THE EUROPEAN CUSTOMER EXPERIENCE MANAGEMENT OUTSOURCING INDUSTRY

FROST & SULLIVAN

Best Practices Criteria for World-class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each recognition category before determining the final recognition recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. Konecta excels in many of the criteria in the customer experience management outsourcing space.

RECOGNITION CRITERIA

Visionary Innovation & Performance	Customer Impact
Addressing Unmet Needs	Price/Performance Value
Visionary Scenarios Through Megatrends	Customer Purchase Experience
Leadership Focus	Customer Ownership Experience
Best Practices Implementation	Customer Service Experience
Financial Performance	Brand Equity

Navigating Transformation: Europe's Evolving CXM Outsourcing Landscape

The European customer experience management (CXM) outsourcing landscape is undergoing a significant transformation, shaped by economic pressures, shifting client expectations, regulatory developments, and accelerating technological innovation. As organizations across the continent seek cost-efficiency in the face of continued macroeconomic challenges, demand for offs

hore outsourced CXM services is rising, while onshore and nearshore are declining.

At the same time, rising expectations for faster, more personalized, and seamless customer interactions, regardless of location, are fueling demand for artificial intelligence (AI)-powered solutions that can deliver consistent, high-quality experiences at scale. These technologies support automation, generate predictive insights, and enable real-time decision-making, all of which are becoming critical to remain competitive in a digital-first economy. However, many clients lack the internal expertise or infrastructure to implement these solutions effectively. As a result, businesses are increasingly turning to CXM providers that offer more than traditional outsourcing services, including technology consulting and systems integration, to support their digital transformation journeys.

To sustain growth in this changing environment, CXM solution providers must broaden their portfolios and rethink how they deliver customer value. Diversification into services such as marketing, sales enablement, and technology consulting will be critical to offsetting the decline in full-time employee revenues. At the same time, strengthening strategic technology partnerships will be essential to keep pace

with client expectations for advanced, AI-enabled services. These alliances not only enable innovation but also provide access to specialized expertise and tools that enhance competitiveness.

As the market outlook remains relatively flat with Frost & Sullivan projecting the overall revenue growth in Europe at just 1.2% compound annual growth rate through 2029, success depend on solution providers' ability to operate with precision across different regional markets.[1] Companies that can tailor offerings to local dynamics while scaling global best practices to deliver comprehensive, technology-driven solutions will be best positioned to capture growth in high-potential sectors, such as travel and hospitality, e-commerce, and healthcare.

Konecta: Redefining Leadership in European CXM Outsourcing

Konecta is a global leader in experience and AI digital services. With over 120,000 employees across 26 countries serving more than 800 clients in 30 languages,[2] the company combines global scale with local delivery excellence. Its strength lies in delivering customized customer experience (CX) solutions across key industries like telecommunications, financial services, e-commerce, and healthcare—underpinned by deep regional expertise in key European markets.

As one of Europe's top five CXM providers,[3] Konecta offers a full spectrum of end-to-end services, from acquisition and retention to technical support and collections, seamlessly hybridizing human and AI capabilities to create experiences that are both empathetic and intelligent. Its ability to blend in-house capabilities with strategic partnerships enables it to design highly adaptive, future-ready solutions.

To sustain this leadership and stay ahead of market shifts, Konecta launched a company-wide transformation strategy tailored to the increasingly digital and demanding CXM landscape. Recognizing the disruption that generative AI (GenAI) and digital platforms pose to traditional business process outsourcing (BPO) models, the company proactively initiated this evolution to redefine its role in the CXM value chain. A leadership change set the stage for this shift, with a clear mandate to move beyond incremental improvement and embrace a full-scale transformation.

Rather than reacting to market pressures, Konecta chose to lead the change, future-proofing its operations by investing in AI, intelligent automation, cloud transformation, and data-driven customer journeys. To this end, the company's more than 5,000 digital experts and over 120 active GenAI projects[4] reflect a commitment to continuous innovation.

Konecta stands out through its unified, company-wide approach to its ongoing transformation. Unlike peers that separate digital innovation from core operations, the company embeds transformation into every function, ensuring that its digital business unit not only serves external clients but also leads internal modernization efforts. As a result, there is no divide between its legacy and digital offerings, with all units engaged in reshaping business models, evolving client offerings, and driving new revenue streams. This integrated approach ensures Konecta's evolution is not siloed but deeply rooted in how the entire company operates and grows.

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[1] *Frost Radar™: Customer Experience Management Outsourcing in Europe, 2025* (Frost & Sullivan, April 2025).
[2] Frost & Sullivan Interview with Konecta (August, 2025)
[3] *Frost Radar™: Customer Experience Management Outsourcing in Europe, 2025* (Frost & Sullivan, April 2025).
[4] Frost & Sullivan Interview with Konecta (August, 2025)

Equally distinctive is Konecta's people-first transformation philosophy. While many competitors focus primarily on technology adoption, the company considers its workforce as the engine of change. Additionally, the company's strategic collaborations with leading technology providers and best-of-breed companies extend beyond simple access to technology. These synergies include structured programs to upskill and certify its teams, co-develop go-to-market strategies, and jointly build value propositions customized to new and existing clients. Besides accelerating the adoption of digital capabilities across Konecta's organization, this approach empowers it to enter previously untapped markets with enhanced credibility.

As the European CXM market matures and client expectations change, Konecta positioned itself as a transformation partner of choice for regional customers. Its unique combination of reach, deep local roots, and bold organizational reinvention places it at the forefront of the CXM industry's next chapter, where human insight, digital intelligence, and measurable business impact converge.

Katalyst 2028: Powering the Next Generation of Customer Experience

Konecta's evolution from a BPO leader to a tech-enabled CXM transformation partner is not just aspirational; it is already operational. This strategic shift is embodied in Katalyst 2028, the company's ambitious, three-year roadmap unveiled in January 2025. Representing the natural progression of its digital-first approach, the initiative aims to secure Konecta's leadership in the CXM industry by harnessing the disruptive power of GenAI, accelerating expansion, and cultivating a future-ready workforce.

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- Bernadine Arnason
Industry Director

At the core of Katalyst 2028 is a commitment to reimagining CX through intelligent automation, strategic advisory services, and next-generation digital platforms. To support this transformation, Konecta launched Konecta Digital, a dedicated business unit that consolidates the company's digital capabilities under one umbrella. Focused on delivering AI-powered, hybrid CX solutions, Konecta Digital serves both as an innovation hub and a consulting partner, guiding clients through GenAI integration, system optimization, and enhanced cybersecurity. Solid alliances with technology leaders such as Google Cloud and Amazon Web Services enable Konecta Digital to spearhead entry into high-growth markets and contribute over 50% of revenue growth by 2028.[5]

This digital acceleration is matched by an equally strong investment in people. Recognizing that technology alone cannot transform CX, Konecta emphasizes upskilling its workforce to align with its AI-driven vision. Through personalized training programs, the company aims to train 15,000 employees in GenAI tools and hybrid operational models. New internal AI solutions, such as digital assistants and AI

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[5] https://konecta.com/news-insights/katalyst-2028-konecta-reveals-an-ambitious-3-year-plan-to-become-a-genai-powered-company

coaches, will further streamline workflow and boost productivity, empowering teams to deliver personalized, seamless experiences with greater speed and precision.

Overall, Konecta engineered Katalyst 2028 to anticipate and shape change in the CXM space, rather than simply responding to it. The initiative sets the company on a clear path toward becoming a true technology data operations partner, redefining CX by blending human ingenuity with the precision of GenAI.

Strengthening Innovation Through Strategic Partnerships

Konecta further accelerates its journey toward becoming a CXM transformation leader through its growing network of strategic partnerships. To this end, the company cultivates a robust ecosystem of technology collaborators to drive value creation, innovation, and operational agility at scale. These alliances are not just complementary; they are central to how Konecta facilitates cutting-edge, hybrid customer experiences across industries and geographies.

A prime example is Konecta's strategic alliance with Google Cloud, announced in early 2024. The partnership powers the next phase of the company's GenAI transformation by embedding Google Cloud technologies into its digital service offerings and internal operations. Beyond migrating teams to Google Workspace to enhance productivity and collaboration, Konecta intends to equip 500 engineers with Google Cloud certifications, building a digitally fluent workforce prepared to deploy advanced AI, automation, and cloud-native CX solutions.[6] This collaboration directly fuels the company's digital business unit, Konecta Digital, accelerating time to value for clients navigating complex digital transitions.

> *"Konecta's unique strength lies in its ability to blend capabilities with deep-rooted local execution. The company fosters strong regional relationships, some spanning over two decades, to cultivate a level of trust that enables agile collaboration and co-innovation. This partnership approach empowers clients to test, adapt, and scale new solutions, including early pilots of GenAI applications."*
>
> *- Sama Suwal*
> *Best Practices Research Analyst*

Similarly, Konecta's alliance with Uniphore, a global AI leader offering the only end-to-end enterprise AI architecture, further strengthens its service capabilities. This partnership combines Uniphore's powerful AI tools, such as real-time emotion detection, sentiment analysis, and conversational AI, with Konecta's operational and consulting expertise to deliver hyper-personalized customer interactions. Together, the two companies aim to generate €500 million in revenue by 2029, with an initial focus on disrupting markets through joint go-to-market initiatives and co-developed GenAI solutions.[7]

These collaborations enhance Konecta's hybrid AI model and reinforce its position as a pioneer in proactive, AI-driven service. By combining external innovation with internal execution excellence, the company redefines what is possible in CXM, transforming complex operations into seamless, insight-driven engagement across the full customer lifecycle.

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[6] https://www.prnewswire.com/news-releases/konecta-and-google-cloud-forge-strategic-alliance-to-drive-ai-enabled-innovation-in-customer-experience-302295209.html
[7] https://konecta.com/news-insights/uniphore-and-konecta-join-forces-to-advance-ai-in-customer-experience-and-digital-transformation

Konecta's Customer-Centric Approach: Built on Trust, Performance, and Longevity

Konecta's CXM solutions go beyond its extensive expertise and best-in-class capabilities, with client value and long-term partnership as strategic imperatives. Over the years, the company has earned a sterling reputation for supporting its clients' growth, operational agility, and digital transformation journeys, from streamlining service operations to enabling intelligent, AI-driven engagement models.

Konecta's unique strength lies in its ability to blend capabilities with deep-rooted local execution. The company fosters strong regional relationships, some spanning over two decades, to cultivate a level of trust that enables agile collaboration and co-innovation. This partnership approach empowers clients to test, adapt, and scale new solutions, including early pilots of GenAI applications. Unlike competitors with rigid, centralized infrastructures, Konecta's decentralized model enables quick, tailored responses to client-specific needs. This proximity to a client's business, combined with mutual trust, creates a strong foundation for meaningful innovation and joint solution development.

This agile mindset is further supported by Konecta's investment in workforce transformation. Its deployment model is reinforced by localized "Tiger Teams" composed of cross-functional experts (including operations leaders, analysts, and client-side counterparts) who ensure every implementation is technically sound and operationally viable. Meanwhile, initiatives like the Konecta Academy and "Pitch Club" equip traditional sales teams with a more consultative, solutions-oriented mindset. This internal upskilling empowers client-facing teams to better identify business needs and translate them into compelling, tech-enabled value propositions. As a result, Konecta accelerates innovation across its client base and embeds long-term strategic thinking into every engagement.

Customer Success Story: Empowering Omnichannel Engagement for Opella[8]

In response to rising digitalization and evolving pharmacy expectations, the leading French healthcare company, Opella, partnered with Konecta to transform its customer engagement model. By implementing a scalable, hybrid solution co-designed with Opella's teams, Konecta centralized customer support operations at its Le Mans site, delivering specialized Level 1 and 2 assistance tailored to pharmacists, hospitals, and wholesalers. This omnichannel service model, combined with proactive sales outreach and expert handling of Opella's "Mon Espace Pro" portal, enabled field teams to focus on high-value activities like performance coaching and pharmacy development. As a result, Opella recorded a 90% satisfaction rate among pharmacists, enhanced operational efficiency, and redefined its commercial approach. Now in its seventh year, the partnership continues to evolve, positioning Opella as a benchmark for hybrid customer engagement in everyday health.

> *"A big bravo for these unprecedented results. We are returning to our historically high customer satisfaction, which is at the heart of our mission. The anticipation of our needs, the strength of the Konecta teams, and everyone's commitment made the difference."*
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> - **Stéphanie Caupenne, Commercial Director, Opella**[9]

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[8] https://konecta.com/news-insights/clients-stories/redefining-opellas-omnichannel-customer-engagement
[9] Ibid.

Konecta's seamless, transparent, and non-adversarial approach to customer relationships has positioned it as a trusted CXM vendor to prominent brands, including Kia, Netflix, Telefónica, and Ekwateur. With an average client tenure of over 20 years, a net promoter score of 54,[10] and a remarkable 96% contract renewal rate,[11] the company consistently demonstrates its ability to deliver measurable results and foster enduring relationships.

A Promising Outlook for 2025 and Beyond

Konecta's evolution into a trusted partner for transformative hybrid experiences is underpinned by strong financial performance, strategic investments, and ambitious growth targets. In 2024, it achieved high single-digit growth, with annual revenue approaching €2 billion, approximately two-thirds of which was generated in Europe.[12] This momentum helps Konecta scale its operations and seize new opportunities across emerging and mature markets. A robust client portfolio and high contract renewal rates fuel recurring revenue across key sectors, including telecommunications, financial services, healthcare, retail, and e-commerce.

Furthermore, with Katalyst 2028, Konecta aims to generate €2.5 billion in revenue by 2028.[13] The company seeks to drive 30% to 40% of this growth through its GenAI-powered digital transformation services, supported by a three-year, €75 million investment plan[14] and an additional €75 million, for a total of €150 million, in new funding secured in early 2025.[15] The capital, split evenly between equity and debt, reflects strong investor confidence and provides the financial agility required to scale AI deployment and digital solutions at pace. Margin expansion, especially in core European markets, is a central objective, powered by both technological innovation and operational efficiency.

Conclusion

Amid rising complexity, evolving customer expectations, and growing demand for intelligent, value-driven solutions, many organizations struggle to navigate the shift from traditional customer experience outsourcing to true digital transformation. Konecta addresses this unmet need with a clear leadership vision rooted in customer-centricity, innovation, and global delivery excellence. Through initiatives like Katalyst 2028, its artificial intelligence-powered hybrid service model, and strong technology partnerships, the company consistently delivers measurable business outcomes while anticipating future client demands. With a proven ability to balance transformation with trust, Konecta has established itself as a strategic, long-term partner, delivering what the European customer experience management market needs today and is poised to demand in the future.

For its strong overall performance, Konecta is presented with Frost & Sullivan's 2025 European Company of the Year Recognition in the customer experience management outsourcing industry.

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[10] Frost & Sullivan discussion with Konecta.
[11] https://konecta.com/news-insights/katalyst-2028-konecta-reveals-an-ambitious-3-year-plan-to-become-a-genai-powered-company
[12] Frost & Sullivan discussion with Konecta.
[13] https://konecta.com/news-insights/katalyst-2028-konecta-reveals-an-ambitious-3-year-plan-to-become-a-genai-powered-company
[14] Ibid.
[15] Ibid.

What You Need to Know about the Company of the Year Recognition

Frost & Sullivan's Company of the Year Recognition is its top honor and recognizes the market participant that exemplifies visionary innovation, market-leading performance, and unmatched customer care.

Best Practices Recognition Analysis

For the Company of the Year Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

Visionary Innovation & Performance

Addressing Unmet Needs: Customers' unmet or under-served needs are unearthed and addressed to create growth opportunities across the entire value chain

Visionary Scenarios Through Megatrends: Long-range scenarios are incorporated into the innovation strategy by leveraging mega trends and cutting-edge technologies, thereby accelerating the transformational growth journey

Leadership Focus: The company focuses on building a leadership position in core markets to create stiff barriers to entry for new competitors and enhance its future growth potential

Best Practices Implementation: Best-in-class implementation is characterized by processes, tools, or activities that generate consistent, repeatable, and scalable success

Financial Performance: Strong overall business performance is achieved by striking the optimal balance between investing in revenue growth and maximizing operating margin

Customer Impact

Price/Performance Value: Products or services offer the best ROI and superior value compared to similar market offerings

Customer Purchase Experience: Purchase experience with minimal friction and high transparency assures customers that they are buying the optimal solution to address both their needs and constraints

Customer Ownership Excellence: Products and solutions evolve continuously in sync with the customers' own growth journeys, engendering pride of ownership and enhanced customer experience

Customer Service Experience: Customer service is readily accessible and stress-free, and delivered with high quality, high availability, and fast response time

Brand Equity: Customers perceive the brand positively and exhibit high brand loyalty, which is regularly measured and confirmed through a high Net Promoter Score®

Best Practices Recognition Analytics Methodology

Inspire the World to Support True Leaders

This long-term process spans 12 months, beginning with the prioritization of the sector. It involves a rigorous approach that includes comprehensive scanning and analytics to identify key best practice trends. A dedicated team of analysts, advisors, coaches, and experts collaborates closely, ensuring thorough review and input. The goal is to maximize the company's long-term value by leveraging unique perspectives to support each Best Practice Recognition and identify meaningful transformation and impact.

STEP		WHAT	WHY
		VALUE IMPACT	
1	**Opportunity Universe**	Identify Sectors with the Greatest Impact on the Global Economy	Value to Economic Development
2	**Transformational Model**	Analyze Strategic Imperatives That Drive Transformation	Understand and Create a Winning Strategy
3	**Ecosystem**	Map Critical Value Chains	Comprehensive Community that Shapes the Sector
4	**Growth Generator**	Data Foundation That Provides Decision Support System	Spark Opportunities and Accelerate Decision-making
5	**Growth Opportunities**	Identify Opportunities Generated by Companies	Drive the Transformation of the Industry
6	**Frost Radar**	Benchmark Companies on Future Growth Potential	Identify Most Powerful Companies to Action
7	**Best Practices**	Identify Companies Achieving Best Practices in All Critical Perspectives	Inspire the World
8	**Companies to Action**	Tell Your Story to the World (BICEP*)	Ecosystem Community Supporting Future Success

*Board of Directors, Investors, Customers, Employees, Partners

![Frost & Sullivan]

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Frost & Sullivan is the Growth Pipeline Company™. We power our clients to a future shaped by growth. Our Growth Pipeline as a Service™ provides the CEO and the CEO's growth team with a continuous and rigorous platform of growth opportunities, ensuring long-term success. To achieve positive outcomes, our team leverages over 60 years of experience, coaching organizations of all types and sizes across 6 continents with our proven best practices. To power your Growth Pipeline future, visit Frost & Sullivan at http://www.frost.com.

The Growth Pipeline Generator™

Frost & Sullivan's proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fueled by the Innovation Generator™.

Learn more.

Key Impacts:

- ■ **Growth Pipeline:** *Continuous Flow of Growth Opportunities*
- ■ **Growth Strategies:** *Proven Best Practices*
- ■ **Innovation Culture:** *Optimized Customer Experience*
- ■ **ROI & Margin:** *Implementation Excellence*
- ■ **Transformational Growth:** *Industry Leadership*

The Innovation Generator™

Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

Analytical Perspectives:

- ■ Megatrend (MT)
- ■ Business Model (BM)
- ■ Technology (TE)
- □ Industries (IN)
- □ Customer (CU)
- ■ Geographies (GE)