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BEST PRACTICES



2026

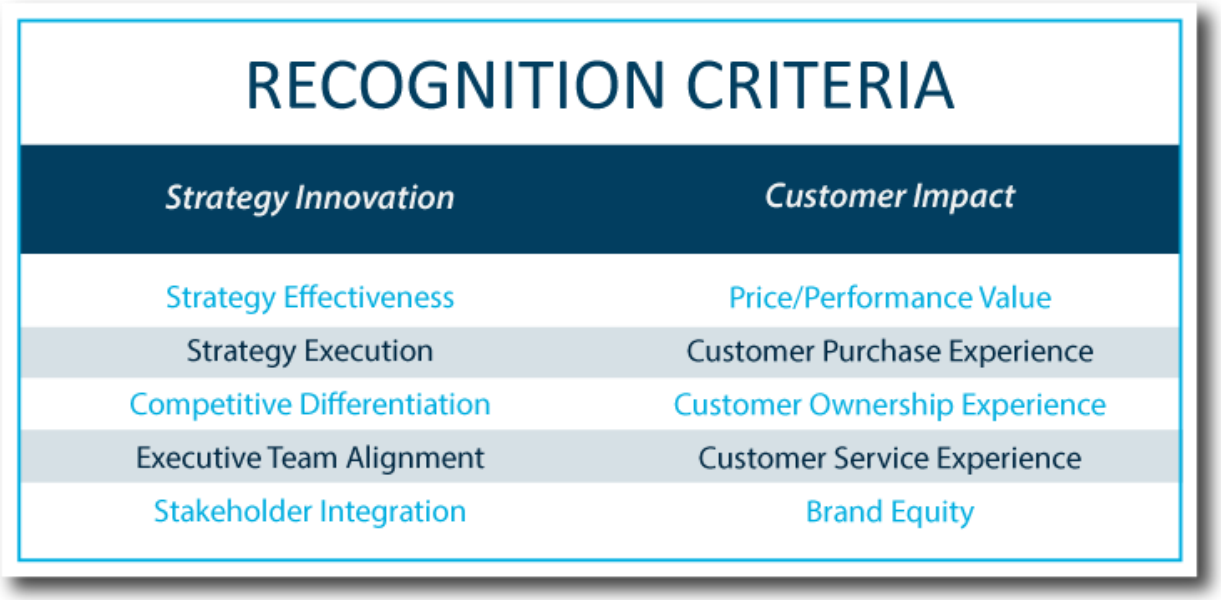
EUROPEAN CUSTOMER EXPERIENCE MANAGEMENT SERVICES

COMPETITIVE STRATEGY LEADERSHIP

intelcia

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. Intelcia excels in many of the criteria in the customer experience management services space.



The Transformation of the Customer Experience Services Industry

Technological advances and rising customer expectations are increasing competitive pressure on business leaders. As organizations in Europe modernize customer experience (CX) operations and scale artificial intelligence adoption, they face a unique set of challenges.

Strict regulatory and ethical requirements, particularly the General Data Protection Regulation (GDPR) and the EU AI Act, place tighter controls on data usage, explainability, and fairness. This requires greater transparency, stronger data governance, clear accountability, human oversight, and AI literacy across the workforce. These regulatory requirements limit certain AI applications, including emotion and accent analysis, and require organizations to rethink traditional AI and analytics approaches.

Many organizations also struggle to move beyond experimentation. AI initiatives often remain at the pilot stage due to unclear business cases, limited return-on-investment (ROI) benchmarks, and weak change management practices. Uncertainty about where to begin, including which customer journeys or processes to automate, further slows progress. The challenge is amplified in highly regulated sectors such as the public sector, utilities, and financial services. These organizations often require AI capabilities to be developed internally or mandate full anonymization of customer interaction data, increasing implementation complexity.

Europe's linguistic diversity and cultural complexity add further challenges. Organizations must deliver consistent yet locally relevant experiences across markets and channels. At the same time, legacy systems,

fragmented customer data, skills shortages, and rising labor costs continue to slow transformation. Organizations must scale multilingual digital engagement while maintaining service quality, ensuring compliance, and preserving meaningful human interactions.

In addition, they face increasing pressure to improve CX outcomes while delivering sustainable cost efficiencies. This heightens the need for hybrid human and AI models, underpinned by robust human-in-the-loop governance and oversight that enable AI to scale responsibly while maintaining compliance and operational credibility.

Scaling AI Adoption Through Operational Expertise, Ecosystem Partnerships, and Robust Governance

Founded in Morocco in 2000, Intelcia has evolved from a regional contact center operator into a leading AI-powered CX and business process outsourcing (BPO) and technology/digital services provider. Through sustained international expansion and a recent transition to full management independence, the company now delivers globally benchmarked, multi-shore solutions and technology-enabled services. Intelcia's differentiation is built on four strategic pillars:

- **Intelligent Operations:** Seamlessly combining human expertise with AI-powered capabilities at scale to enhance operational efficiency, improve decision-making, and drive superior customer and business outcomes.
- **Calibrated Delivery:** Tailored operating models designed around each client's maturity, objectives, and business context, ensuring a flexible, personalized, and high-impact delivery approach.
- **Relevant Scale:** Leveraging global governance and capabilities while maintaining the agility, responsiveness, and cultural proximity of nearshore operations, enabling both consistency and adaptability.
- **One Culture:** A people-centric culture reinforced by strong operational discipline, fostering shared values, high performance, and consistent service excellence across all geographies and teams.

Over the past two decades, Intelcia has established itself as a strategic CX transformation partner, serving enterprises in telecommunications, utilities and energy, banking, insurance, retail, and the public sector. The company's operations span 19 countries across Europe, Africa, and the Americas, supported by a workforce of approximately 40,000 employees. This extensive footprint enables Intelcia to deliver multilingual, multi-country service delivery capabilities while maintaining operational scale and proximity to key client markets.

Frost & Sullivan finds that Intelcia anchors its strategy in an integrated model named Trusted Intelligent Operations, that combines human judgement, AI and data with deep industry expertise, process knowledge, and is accountable for business outcomes rather than capacity.

Two highly complementary business units: Intelcia CX, which delivers end-to-end CX services, and Intelcia Tech, which provides enterprise technology and digital solutions. Bridging both is Evoluciona, Intelcia's innovation and consulting hub that helps translate AI and digital transformation into integrated, scalable, and measurable client outcomes.

Intelcia CX serves as the company's foundational pillar that specializes in managing and optimizing end-to-end customer journeys, including multichannel customer support, customer acquisition, sales and retention, onboarding, and technical support. The business unit also manages large-scale multilingual operations under long-term client engagements. These enduring relationships have enabled the company to develop deep expertise in customer journeys, operational performance management, and industry-specific service delivery.

Powered by Evoluciona, the company's dedicated AI and innovation hub, Intelcia CX combines human empathy, business intelligence, and generative AI capabilities to enhance operational productivity, elevate CX, and strengthen brand loyalty. Complementing this capability, Intelcia Tech operates as a dedicated technology business focused on digital transformation, AI, cloud, cybersecurity, IT services, and infrastructure engineering.

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> ***– Sherrel Sonia Roche,***
> ***Associate Director, ICT Research***

Together, Intelcia CX and Intelcia Tech combine operational excellence with technology expertise, allowing the company to embed AI pragmatically into existing client environments and business processes. This integrated approach positions the company not only as a service provider, but as a strategic partner capable of delivering both operational outcomes and technology-led transformation at scale.

Intelcia has invested in a broad, CX-focused portfolio of AI- and technology-enabled solutions industrialized through its Evoluciona hub and scaled across its CX operations. On the customer-facing side, it deploys agentic AI for customer interactions, including chatbots, voicebots, and mailbots, with seamless escalation to human agents when needed. These capabilities are supported by conversational AI, speech and text analytics, and predictive net promoter score (NPS) modeling, providing a holistic multichannel view of the voice of the customer (VOC) and helping determine which interactions to automate, streamline, or retain.

For internal operations, Intelcia has developed a robust suite of agent augmentation tools, including AI training simulators, real-time copilot and agent assistance solutions, live translation capabilities, and extensive post-interaction automation (e.g., automated summaries, after-call work, back-office case handling, and AI-powered quality monitoring) supported by personalized coaching playbooks. These solutions are delivered through a modular CX AI architecture tailored to individual client requirements while remaining reusable across markets. A hybrid technology stack spanning automation, generative AI, agentic AI, and advanced analytics powers the architecture, supported by its technology partner ecosystem.

Underpinning this approach is a responsible AI framework that emphasizes regulatory compliance, human oversight, explainability, and the use of smaller models where appropriate. Intelcia has also invested in managed AI operations, establishing AI trainer roles and knowledge engineering capabilities, alongside

enterprise-wide AI enablement initiatives. These include an internally developed productivity platform based on Gemini Pro that serves Intelcia's employees, as well as the Innovators upskilling program. Together, these investments ensure that innovation extends beyond pilot programs and is embedded into everyday CX delivery at scale.

Intelcia has moved AI beyond experimentation by deploying more than 350+ AI projects deployed across its CX operations, supporting adoption among approximately 40,000 collaborators, and establishing more than 100 AI trainer roles. These measures show that AI is embedded in the company's delivery model as an operational lever for productivity, quality, and service differentiation.

Frost & Sullivan notes that the combination of scaled deployments, emerging AI-related revenue streams, measurable client impact, and disciplined governance demonstrates Intelcia's progression from adopting AI technologies to operating AI-powered business services. This capability strengthens its position to capture value from operational transformation and growing demand for managed AI services across industries and geographies.

Industrializes AI Across Customer Operations Through a Value-Driven Delivery Model

Intelcia engages clients through an operations-led, co-creation model that builds on existing CX and BPO relationships rather than leading with standalone AI product offerings. Positioning itself as a pragmatic, long-term transformation partner, the company typically operates under contracts spanning three to five years, with many client relationships extending beyond a decade.

The company's go-to-market approach is fundamentally value-driven, emphasizing proactive client engagement and continuous optimization rather than responding solely to stated demand. With only 10% to 15% of AI initiatives originating from direct client requests, Intelcia demonstrates a strong ability to identify, articulate, and create proactively AI-led transformation opportunities within its existing client base.

Leveraging insights from frontline delivery teams, Intelcia continuously identifies operational pain points and improvement opportunities, which Evoluciona translates into prioritized, KPI-driven initiatives. The company works closely within each client's operational, regulatory, and organizational constraints, particularly in highly regulated industries, tailoring solutions to data privacy, sovereignty, and AI governance requirements. Maintaining a technology-agnostic approach, Intelcia deploys solutions on client-preferred platforms and often collaborates with early-adopter clients as design partners. Rather than simply implementing tools, the company embeds cross-functional teams, including consultants, AI trainers, and quality and training specialists, within client operations to support transformation, adoption, and sustained value realization.

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Intelcia's modular buy-and-build model combines approximately 35 technology partners, Evoluciona's 60 consultants, and Intelcia Tech's systems integration, cloud, data, and cybersecurity expertise. This ecosystem has supported industrialized AI deployments in France, Spain, and Portugal and active AI programs in more than 65% of its large-scale client engagements. Compliance-by-design principles—including human oversight, explainability, economic viability, data anonymization, and alignment with client risk profiles—allow Intelcia to tailor deployments to the operational and regulatory realities of European markets.

To support its model, Intelcia has deployed an internally built AI orchestration platform, based on best-of-breed components, that brings together AI agents, automation, data and human expertise across both client operations and Intelcia's own internal processes. Open by design, it integrates with clients' existing technology ecosystems and Intelcia's technology partners — so that AI scales inside delivery without locking clients into a single stack.

Intelcia also adopts a pragmatic approach to AI deployment that balances innovation with operational and regulatory realities. The company's willingness to tailor solutions based on economic viability, compliance requirements, and client risk profiles, including the use of delayed transcription models, data anonymization practices, and human oversight mechanisms, reflects a mature understanding of enterprise adoption barriers. This is particularly relevant in regulated European markets, where governance, transparency, and trust are increasingly critical determinants of AI success.

Evoluciona's consulting expertise and Intelcia Tech's enterprise technology capabilities further strengthen these capabilities, enabling Intelcia to convert AI investments into measurable improvements in cost efficiency, operational performance, customer satisfaction, and revenue generation. AI initiatives are typically delivered as part of broader BPO engagements, supplemented by implementation and managed AI services as needed, creating a clear pathway for clients to evolve from traditional outsourcing to integrated CX and technology transformation.

The company structures its client partnerships around measurable outcomes such as shared accountability for cost optimization, service quality, and revenue growth. Strong change management and human oversight support adoption, while the implementation pace aligns with each client's strategic objectives, operational readiness, and regulatory obligations. This outcome-based model enables clients to progress from traditional outsourcing to sustainable hybrid human-and-AI operations.

Leadership-Driven Transformation Fuels Global Expansion and Diversification

Intelcia entered a new strategic phase in April 2026 when its executive shareholders acquired the 65% stake previously held by Altice, giving the management team full ownership. Led by CEO and co-founder Karim Bernoussi and Deputy CEO Youssef El Aoufir, the company can now pursue its ambition to become a global top-10 multiservice outsourcer by 2030 with greater strategic independence. The transaction reinforces management's commitment to expanding Intelcia's CX, technology, and AI capabilities while preserving its human-centered culture. The new ambition is structured through Trust in Action 2030, a group-wide strategic program built around four pillars: Augmented Organization, Trusted Intelligent Operations, Expansion & Diversification, and One Intelcia.

Under the leadership of Karim Bernoussi and Youssef El Aoufir, Intelcia has undergone a remarkable transformation over the past decade. The company has expanded its footprint from 3 to 19 countries, establishing a strong presence in Africa, Europe, Latin America, and North America, while increasing its revenue tenfold and strengthening its position as a leading CX management service provider in key markets such as Spain, France, and Portugal.

Intelcia has also expanded its reach in English-speaking markets through its operations in Latin America and Egypt, with Egypt emerging as a strategic regional delivery hub. In parallel, the company diversified its business portfolio by launching Intelcia Tech in 2019, creating a dedicated business line focused on technology and IT services and is recognized today as a regional IT player in the French market.

Looking ahead, Intelcia aims to accelerate its growth trajectory through targeted acquisitions in Europe and Latin America, further strengthening its international presence and expanding its ability to support multinational clients. Technology and innovation remain central to the company's strategy, particularly within CX services, where Intelcia continues to invest heavily in AI and digital capabilities. Its approach remains pragmatic and business-focused, leveraging AI to enhance CX outcomes while adapting to evolving market needs and regulatory requirements. Business diversification also remains a strategic priority. Intelcia's continued expansion reflects the group's ambition to become a leading player in digital transformation, capable of supporting clients across the full technology value chain, from infrastructure services to application services. Together, these initiatives position Intelcia to strengthen its competitive standing as a global, technology-enabled, multi-service outsourcing provider.

Intelcia positions itself as a human-centered challenger in the CX, BPO and IT market, differentiating through culture, operational proximity, agility and domain expertise. Its leaders do not lead with standalone AI product sales; instead, they build long-term CX relationships and co-create initiatives with clients, frontline teams, and Evoluciona. By grounding innovation in business processes and operational realities, Intelcia combines human expertise, cultural alignment, and disciplined execution within a responsible, regulation-aware framework. This approach is increasingly relevant to enterprises seeking to scale AI while maintaining trust, accountability, and meaningful human involvement.

Conclusion

Intelcia stands out in Europe's CX management services market by uniting the operational reach of Intelcia CX, the technology capabilities of Intelcia Tech, and Evoluciona's consulting expertise. Its operations-first model applies AI, automation, and analytics within live customer environments while balancing multilingual delivery, nearshore responsiveness, human expertise, and compliance-by-design. Proven implementations across France, Spain, and Portugal demonstrate its ability to turn innovation into measurable improvements in efficiency, customer satisfaction, operational performance, and revenue. With its strong overall performance, Intelcia earns Frost & Sullivan's 2026 European Competitive Strategy Leadership Recognition in the customer experience management services industry.

What You Need to Know about the Competitive Strategy Leadership Recognition

Frost & Sullivan's Competitive Strategy Leadership Recognition identifies the company with a standout approach to achieving top-line growth and a superior customer experience.

Best Practices Recognition Analysis

For the Competitive Strategy Leadership Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

Strategy Innovation

Strategy Effectiveness: Effective strategy balances short-term performance needs with long-term aspirations and overall company vision

Strategy Execution: Company strategy utilizes best practices to support consistent and efficient processes

Competitive Differentiation: Solutions or products articulate and display unique competitive advantages

Executive Team Alignment: Executive team focuses on staying ahead of key competitors via a unified execution of its organization's mission, vision, and strategy

Stakeholder Integration: Company strategy reflects the needs or circumstances of all industry stakeholders, including competitors, customers, investors, and employees

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.

		VALUE IMPACT	
STEP		WHAT	WHY
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

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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)

