FROST & SULLIVAN

BEST PRACTICES



2026

INDONESIAN DIGITAL BUSINESS PROCESS OUTSOURCING

COMPANY OF THE YEAR

infomedia

Your Digital CX Partner

by Telkom Indonesia

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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. PT Infomedia Nusantara (Infomedia) excels in many of the criteria in the digital business process outsourcing services space.



The Transformation of the Indonesian BPO Services Industry

In 2025, Indonesia's business process outsourcing (BPO) services market faced significant pressure from multiple fronts. Budget constraints cut discretionary spending across ministries and state-owned enterprises; the ongoing anti-corruption drive slowed procurement processes; projects that had previously cleared approval stalled; while revised outsourcing rules changed the structuring of service contracts, particularly in the banking sector. Despite these challenges, demand for BPO services remained steady.

What did change, however, was the procurement approaches of these services. Buyers started moving from conventional, labor-led contact-center outsourcing to a more sophisticated model combining digitally enabled BPO services that integrate omnichannel operations, automation, analytics, artificial intelligence (AI), and industry expertise.

These market movements split the provider base along a long-standing fault line. One group focused on technology licenses, shifting the implementation burden to the client. Buyers opting for this route found that a capable AI platform delivered little without the operating discipline to run it; several returned to market within the year to replace the operator while keeping the software. The second group of providers offered headcount at lower day rates; however, buyers choosing this approach encountered challenges associated with wage inflation and rising attrition, ultimately erasing the cost savings.

The more successful providers recognized the need to integrate technology and operations rather than treating them as separate purchases. According to Frost & Sullivan, the Indonesian market is moving toward an AI-powered digital BPO model in which the provider integrates people, processes, technology, and data; carries accountability for end-to-end business outcomes, owns the automation lifecycle; and is

paid against measured performance instead of seats or licenses. Infomedia has emerged as an early mover in this evolving field, advancing further and faster than competitors in the market.

Navigating the Downturn Through Strategic Investments

Infomedia's astute understanding of recent market shifts as a demand-shape problem, rather than a demand-volume one, guides its investment strategy. This insight has enabled the company to maintain its strong delivery footprint across 14 sites in 9 cities, while preserving its workforce. Instead of following the industry trend of cutting capacity or discounting to hold volume, Infomedia strategically targeted investments into the automation layer beneath.

> *"Infomedia stands out in this landscape by opting out of platform-only bids and opening client conversations focused on use case discovery instead of product specifications. It first identifies the enterprise transformation outcomes the client needs—whether through digital process optimization, AI-driven operational efficiency, lower cost-to-serve, stronger governance, or improved customer experience—then designs the right combination of technology, automation, people, and managed services to deliver them."*
>
> ***– Krishna Baidya,***
> ***Senior Director, ICT Practice***

The unmet need for enterprises is increasingly clear. Companies that tendered AI platforms as standalone technology purchases have reported failed implementations owing to the lack of skills. Moreover, splitting customer operations tenders into separate lots—people, platform, and facilities—often resulted in low accountability. Infomedia stands out in this landscape by opting out of platform-only bids and opening client conversations focused on use case discovery instead of product specifications. Infomedia first identifies the enterprise transformation outcomes the client needs—whether through digital process optimization, AI-driven operational efficiency, lower cost-to-serve, stronger governance, or improved customer experience—then designs the right combination of technology, automation, people, and managed services to deliver them.

What distinguishes Infomedia's approach from traditional consultative selling is the forward-looking perspective that considers the human-to-machine ratio in customer-facing and business support operations across three stages. Currently, human efforts dominate Infomedia's operations, with AI contributing a minority share. The next stage envisions an even division, with people moving into supervision, quality control, and exception handling. Ultimately, this will lead to a reversal of the original ratio, concentrating human expertise on judgment-related processes. Each stage changes the design of workflows, human roles, governance, contract structures, and margins.

Preparation for the third stage has already begun. Infomedia's two agentic AI systems, Aletta and Aura, were developed to support the next phase of AI-driven operations rather than simply manage current transaction volumes. Operating in both Bahasa Indonesia and English, Aletta intelligently processes inbound customer requests by extracting structured information, responding to routine data requests, and creating complete service records. Aura automates post-resolution activities, including case closure, ticket clean-up, and repetitive operational tasks, while capturing execution knowledge to continuously improve operational efficiency and AI learning. Frost & Sullivan lauds Infomedia's foresight in identifying a specific end state and building for it years in advance. In contrast to most providers in the market that

perceive AI adoption as a direction, Infomedia views it as a distinct sequence with a clear destination, aligning its operations to meet the evolving needs of its customers.

Owning the Whole Operation, Front Office to Back

Infomedia holds the strongest position in the Indonesian CRM services outsourcing market, with an estimated market share of nearly 40%, while maintaining a meaningful presence in adjacent back-office services. By integrating customer-facing operations with digitally enabled shared service operations (SSO), Infomedia delivers a unified digital BPO model that combines people, processes, technology, data, and governance within a single accountable operating framework. The company serves 536 client organizations across banking, telecommunications, energy, healthcare, government, transportation, manufacturing, education, and retail.

The company's broad market base explains its success in securing initial CRM or CX engagement contracts, delivering against measured targets, and subsequently expanding into adjacent back-office functions with the same client. The trust it earns in the front office translates into back-office opportunities that neither technology vendors nor staffing providers can effectively match. This, coupled with decades of continuous operational excellence, an accreditation stack covering ISO 9001, 27001, 27701, 22301, 37001, and COPC certification, and a workforce trained in formal technology and cybersecurity certification tracks, heightens the barriers to entry for challengers.

Infomedia's back-office capabilities extend well beyond traditional shared services. The company has evolved its SSO into a digital operating model that centralizes finance, human resources, procurement, and other enterprise support functions under a unified governance framework. Rather than simply processing transactions, Infomedia integrates AI, intelligent automation, analytics, and operational consulting to transform back-office functions into strategic value creators. This enables clients to standardize operations, improve decision-making through data-driven insights, strengthen governance, and continuously optimize business processes. By combining front-office customer engagement with digitally enabled back-office operations, Infomedia delivers a true end-to-end digital BPO model.

Infomedia's move to lower its dependence on its parent company in the past three years has proven critical for cementing its leadership. The company's external market revenue has grown as a share of the business in each of those years, with the largest single-year gain occurring in the past year. Particularly notable is that this growth was achieved during a period of cautious buying among Indonesian customers. That timing is significant, as gains came from competitive wins rather than market expansion. As part of its regional growth strategy, Infomedia is progressing engagements to expand its multilingual offshore contact center capabilities beyond Indonesia, including with a telecommunications operator in Timor-Leste. At the same time, the company is advancing opportunities to provide AI-enabled voice services for a regional hospitality platform serving Indonesia, the Philippines, and Malaysia in Bahasa Indonesia, English, and Tagalog. These efforts solidify Infomedia's leadership in efficiently scaling its operations across the CRM and back-office service environments in Indonesia and beyond.

Elevating AI Operating Systems Beyond Pilot Projects

Infomedia operates AI as a supervised production discipline embedded in live business processes, rather than as a portfolio of isolated technology pilots. This is the clearest operational distinction between the

company and the wider evaluated field: most providers can point to deployed models, while few can demonstrate the governance, monitoring, and continuous improvement required to operate AI at enterprise scale. At the core of its approach is the Infomedia Digital Operations Center, which operates around the clock across every service line, expanding its focus from overseeing human tasks to monitoring robotic and AI work under a single governance frame. The center covers critical functions such as incident management, change enablement, service level management, and problem management, all run through its AI-assisted Information Technology Service Management (ITSM) processes. This includes anomaly detection, model drift detection, root cause correlation, and scheduled retraining. Beneath these layers sits a common foundation for data governance, security compliance, cloud infrastructure, and MLOps. As a result, any accuracy problems in a deployed voicebot promptly surface as a monitored incident with an owner, and not as a client complaint weeks later.

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Competitors often find this part of the operating model the hardest to replicate due to its complex foundation and high upfront costs, which can be challenging to realize in the short term. Infomedia runs more than 20 AI use cases and over 100 robotic process automation bots in live production across multiple industry verticals, covering chatbot, voicebot, speech-to-text, intelligent document processing, and workflow automation. These capabilities support clients from business discovery and solution design through deployment, managed operations, and continuous optimization, embedding AI directly into day-to-day enterprise processes.

Two design choices contribute to the endurance of the Infomedia model. First, Infomedia embeds accuracy improvements as an operational function within its framework, rather than assigning it to the platform vendor. The company's dedicated AI operations team owns model training and is measured on accuracy and business impact, ensuring performance improves after going live rather than decaying over time. Second, it structures human oversight from the start, through a three-stage onboarding sequence of development, hypercare, and live operation, with quality control, knowledge base training, and business impact analysis feeding continuously back into the models. Additionally, Infomedia sustains its robust capability pipeline through AI labs and research partnerships with Telkom University and Brawijaya University, as well as certification programs with its global technology partners to ensure continuous innovation in the market.

Maintaining Margin Discipline in a Contracting Market

In 2025, Infomedia prioritized maintaining margin and balance sheet quality over aggressively pursuing top-line sales growth, which Frost & Sullivan commends as a strategic commercial position given the challenging market conditions. Despite the company's revenue remaining broadly flat, every financial metric below the revenue line has shown favorable results for the third consecutive year.

A detailed review of Infomedia's financial performance encompassing profitability, capital structure, and returns on capital over three years revealed notable improvements in gross, operating, and net margins. The company reduced costs through automation, avoiding compromises to its delivery capabilities. Notably, borrowings fell significantly relative to equity, while liquidity strengthened over the same period, moving the balance sheet to a comfortable position. Returns on equity, assets, and invested capital all increased, with returns on invested capital consistently surpassing the cost of capital throughout. Currently, Infomedia's margins align closely with global BPO benchmarks, underscoring its operational efficiency.

Infomedia's growth strategy against competitors makes it especially impressive. Competing providers may have sought volume through discounts, given Indonesia's price-conscious tender behavior during the period, locking in a lower margin for the length of every contract signed. In contrast, Infomedia's deliberate move to absorb a flat year to maintain pricing integrity strengthened its balance sheet, improved its revenue mix, and ensured its operating model caters to future needs. The company's management team described 2025 as a year of transformation, opting not to defend its top line in favor of sustainability.

Paying for Outcomes, Not Seats

Infomedia delivers AI-powered digital BPO services against contracted operational and business outcomes. Before signing, the company agrees on delivery standards, accuracy levels, productivity targets, and relevant business-impact measures with the client and then assumes accountability for achieving them. This shifts the commercial model from paying for seats or licenses to paying for measurable transformation outcomes. A recent engagement with a regional hospitality platform demonstrates the effectiveness of this approach. The client set a rigorous ceiling on the handover ratio, defining the share of contacts automation must escalate to a human agent. Infomedia exceeded these expectations by maintaining average response times to just a few seconds. Its outcome-based payment structure captured the value of every accuracy improvement for both the client and Infomedia. This strategy incentivizes clients to maintain training models long after going live, unlike license-based contracts that provide the vendor no such reason. This difference establishes a lasting competitive advantage over the life of an engagement.

Infomedia builds its purchase path to remove risks that stall decision-making processes. While technology suppliers in the Indonesian market typically offer demonstrations and trial accounts, Infomedia proactively structures its sales model by running a paid proof of concept in which both parties define the delivery, accuracy, and productivity levels the pilot must reach. This unique try-and-buy model effectively transforms trial engagements into the principal route through which Infomedia sells digital and AI operations. By allowing buyers to see the measured results using their data before committing budget, Infomedia eliminates common objections that typically derail decision-making.

The approach aligns with a broader shift in Indonesian enterprise buying behavior, positioning Infomedia ahead of the pack. Enterprise buyers are growing increasingly resistant to capability claims presented in sales pitches and demand to see delivered outcomes, whether through reference engagements or pilot projects. Within this context, Infomedia's commitment to outcome-based pricing and a customer-driven purchasing strategy is a compelling value proposition.

Enhancing Service Levels Through the Transition

Infomedia's revamp of its delivery model is a significant contributor to its success at client-facing service performance—a feat that has not gone unnoticed by clients. Unlike many providers that encounter a decline in service quality during the shift to automation programs as models mature, Infomedia has maintained superior service standards throughout the process.

Its partnership with a national financial services institution exemplifies this approach. Under the collaboration, the client determined response times, automation coverage, and escalation targets in the contract. Infomedia exceeded all three targets by a wide margin, resolving the majority of contact volumes without agent intervention, accelerating response times, and addressing every critical incident recorded during the period through its AI-assisted incident management feature.

The model, designed to be adopted in stages, deepens client relationships. Clients start with a clearly defined use case, monitor its performance, and extend automation into adjacent workflows at a pace suited to their operations. This strategic sequencing matters in regulated sectors, where organizations such as banks or state agencies must adhere to stringent governance timelines. Infomedia excels in this environment, given the good balance between its front-office and back-office businesses, presenting a rare advantage among most Indonesian providers.

During the evaluation period, Infomedia reported significant improvements in client sentiment, measured through a formal net promoter program and internal service performance index. The company's management attributes these positive results specifically to carefully phased AI adoption. The most compelling testament to Infomedia's brand strength is its extensive base of 536 clients, successfully retaining them even as buyers across multiple sectors restricted budget allocations.

Conclusion

Infomedia used a contracting Indonesian market to rebuild how it delivers, rather than defend the conventional outsourcing model. Throughout 2025, the company held its revenue while improving profitability, strengthening its balance sheet, and increasing the share of business won outside its parent group. It achieved this by integrating AI, automation, data, and managed operations within a supervised, outcome-based digital BPO model spanning customer-facing and business support processes.

Infomedia's competitive advantage lies not in any single technology, but in its ability to translate technology into measurable and continuously improving enterprise outcomes. This combination of transformation capability, operational discipline, end-to-end accountability, customer impact, and financial resilience distinguishes Infomedia from conventional BPO providers and positions it as a leading AI-powered digital BPO provider progressing toward a broader role as an enterprise digital transformation partner.

With its strong overall performance, PT Infomedia Nusantara earns Frost & Sullivan's 2026 Indonesian Company of the Year Recognition in the digital business process outsourcing services industry.

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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 megatrends 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®

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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

About Frost & Sullivan

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)

