

# The B2B Pulse for Telcos

Six strategic imperatives to win  
in connectivity and beyond

## Telcos must act as ...



### Growth partner

01

- 74% of organizations want telcos to be accountable for business outcomes
- However, only 39% say their telco provider drives top-line growth



### Ecosystem orchestrator

02

- 65% expect telcos to orchestrate ecosystems across IT, software, SIs and OEMs
- However, just 35% say their telco currently acts as an end-to-end orchestrator



### Network innovation architect

03

- Non-Terrestrial Networks (NTNs) are moving mainstream: 53% of organizations prefer to partner with telcos that offer NTNs
- Intelligent networks are also becoming essential: 53% are already adopting advanced network services



### AI transformation engine

04

- Organizations expect telcos to play a pivotal role in enabling their AI ambitions, with 80% expecting intelligent, AI-driven networks
- However, 72% say their telco lags hyperscalers and tech-natives in AI and cloud



### Trusted ally

05

- 62% of organizations see telcos as a preferred partner for sovereign cloud/AI services in their region/country
- 63% expect AI-powered cyber and threat-detection from telcos



### Personalized and simplified experience provider

06

- Experience excellence is increasingly shaping enterprise priorities, with 64% deeming seamless CX critical
- Yet 65% say they find the telco buying process too complex (up from 51% in 2024)

Source: Capgemini Research Institute, Telco business customers survey – 2nd edition, November–December 2025, N = 1,100 organizations.

## The telco playbook for accelerated B2B growth



### Choose your battleground

*Prioritize high-value “plays” aligned to your customers and core advantages*



### Foster partnerships across the value chain:

*Shift from vendor management to co-creation with partners*



### Strengthen trust as a differentiating advantage:

*Provide sovereign and secure digital solutions*



### Make AI the center of your operating and value creation model:

*Embed intelligence across operations and customer experience*



### Build future-ready talent and culture:

*Equip your workforce for solution-oriented mindset*

Source: Capgemini Research Institute analysis.

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