

NEAT EVALUATION FOR MOVATE:

CX Services Transformation

Market Segment: Overall

Introduction

This is a custom report for Movate presenting the findings of the 2025 NelsonHall NEAT vendor evaluation for *CX Services Transformation* in the *Overall* market segment. It contains the NEAT chart of vendor performance, a summary vendor analysis of Movate, and the latest market analysis summary.

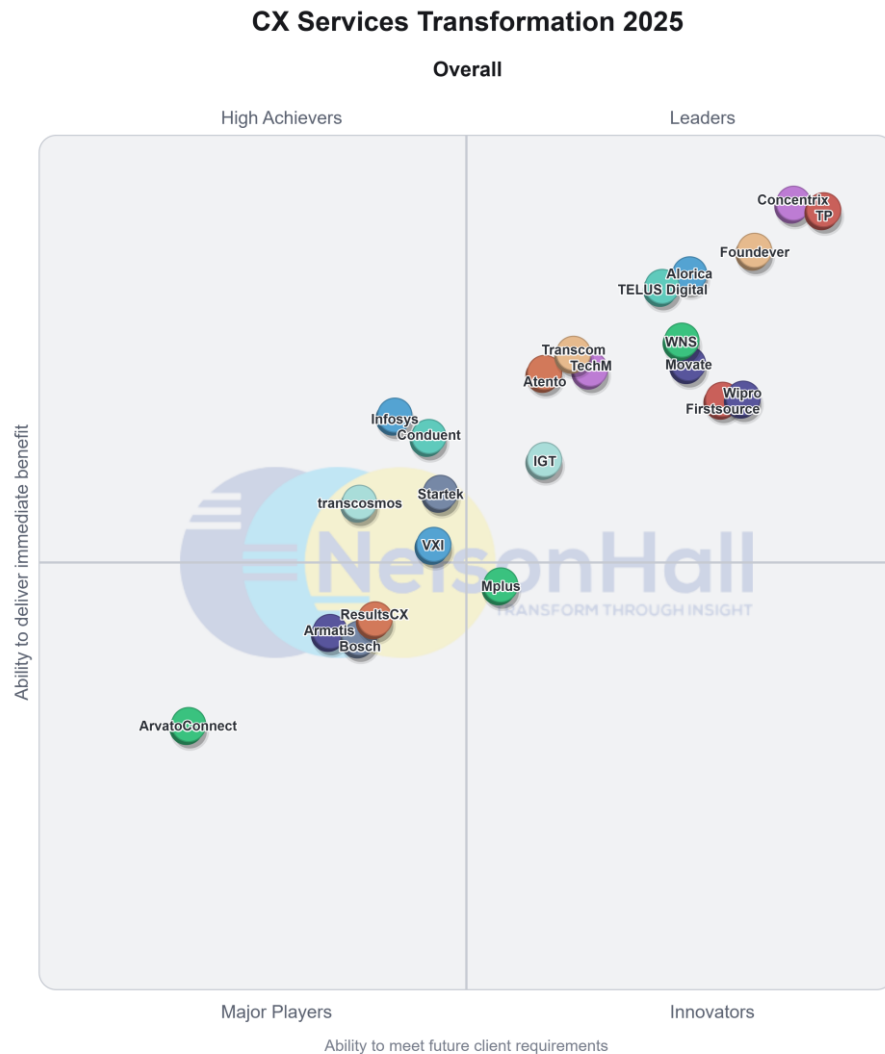
This NelsonHall Vendor Evaluation & Assessment Tool (NEAT) analyzes the performance of vendors offering Customer Experience (CX) transformation services. The NEAT tool allows strategic sourcing managers to assess the capability of vendors across a range of criteria and business situations and identify the best performing vendors overall and with specific capability in CX improvement, cost optimization, and revenue generation.

Evaluating vendors on both their ‘ability to deliver immediate benefit’ and their ‘ability to meet client future requirements’, vendors are identified in one of four categories: Leaders, High Achievers, Innovators, and Major Players.

Vendors evaluated for this NEAT are: Alorica, Armatis, ArvatoConnect, Atento, Bosch Service Solutions, Concentrix, Conduent, Firstsource, Foundever, IGT Solutions, Infosys, Movate, Mplus, ResultsCX, Startek, Tech Mahindra, TELUS Digital, TP, Transcom, transcosmos, VXi Global Solutions, Wipro, and WNS.

Further explanation of the NEAT methodology is included at the end of the report.

NEAT Evaluation: Overall



NelsonHall has identified Movate as a Leader in the *Overall* market segment, as shown in the NEAT chart. This market segment reflects Movate's overall ability to meet future client requirements as well as delivering immediate benefits to its CX services clients.

Leaders are vendors that exhibit both a high capability relative to their peers to deliver immediate benefit and a high capability relative to their peers to meet future client requirements.

Buy-side organizations can access the *CX Services Transformation* NEAT tool [here](#).



Vendor Analysis Summary for Movate

Overview

Movate is a private IT services and BPS company headquartered in Plano, Texas. It provides enterprise support, infrastructure, network, cloud, cybersecurity services, engineering and testing, application development, smart mobility services, analytics-as-a-service, CX services, GenAI and agentic AI, and digital transformation.

The company's CX services include customer care, L1-L3 technical support, product support, customer acquisition, lead generation, upsell and cross-sell, marketing campaigns, order processing, social media service, care, content moderation, trust and safety, KYC/AML, and fraud prevention. Revenue acceleration services are under a dedicated SalesEdge portfolio of offerings. Its CX transformation services include CX consulting and advisory, UX/UI design, operations optimization, process re-engineering, customer journey mapping, omnichannel activation, self-service enablement, CCaaS, contact center infrastructure, app and microservices, and systems development.

Movate also designs and delivers omnichannel, conversational interfaces, multi-intent routing and smart IVRs, machine translation, intelligent automation, customer-facing GenAI and agentic AI and employee-facing virtual assistants and real-time augmentation tools. Its CX analytics offerings include operational analytics, speech and text analytics, predictive models, VOC and sentiment analytics, AI-powered insights, IoT analytics, reporting, BI, insights, and analytics-as-a-service.

The company has a dedicated Movate AI practice to help organizations accelerate digital transformation. It builds AI-first, data-driven assets and integrates AI into core operations. It offers standalone services and managed AI adoption, as well as integration with third-party platforms and IP such as Movate Edison and Movate Insights.

Movate has ~12k CX services employees in 21 sites in North America, LATAM, and Asia. Movate OnDemand is the company's gig workforce platform with ~10k active users in ~60 countries, supporting ~100 languages.

Movate has ~145 CX services clients in fintech, SaaS, hardware manufacturers, automotive OEMs, high tech, consumer electronics, telecom and networking, streaming media, gaming, and entertainment, retail and ecommerce, specialty online retailers, food delivery companies, and logistics providers.

It has a suite of CX platforms, including a universal chatbot, automation platform, intent recognition and predictive routing, GenAI and agentic AI tools, and a business and enterprise insights platform.

Financials

For 2025, NelsonHall estimates Movate's CX services revenues to be ~\$270m.



Strengths

- Dedicated AI development and adoption practice with resources, frameworks, and IP
- Robust CX transformation suite of conversational AI, GenAI, and agentic AI assets with a portfolio of implementations
- Focused revenue generation offerings with experience across its key sectors
- Flexible delivery model incorporating traditional and gig workforce with live deployments in support processes
- Active investments in data services and analytics resources and partner network.

Challenges

Movate could consider:

- Positioning its CCaaS offerings more effectively, and integrating them more actively in CX transformation services
- Further expanding its delivery network, particularly in EMEA, to support multinational clients in the regions
- Accelerating automated QA rollout to reach leading market examples.

Strategic Direction

With W(AI)VE, Movate is advancing CX services focusing on AI-driven transformation and flexible and borderless delivery using FTEs and gig workforce, where agents are empowered as value creators with AI augmentation. The client relationships are dynamic, KPI-linked, and outcome-based with measurable ROI. Specific steps include investments in embedded AI innovation for continuous transformation and AI discovery to achieve hyperpersonalization and proactive and empathetic journey-led experiences. Movate is building GenAI solutions for personalization such as chatbots for 24x7 self-service, copilots for agent and engineer sales and support, and automated contact center operations with per-resolution pricing through Movate Edison.

The company introduced Movate Spectrum assessment to guide clients through AI-based CX transformation, particularly complex case management and addressing challenges such as capturing knowledge across the support ecosystem. The composable data and AI framework will drive automation and personalized experiences. The Movate AI subsidiary was created to support enterprises in AI adoption through partnership and proprietary AI tools such as the Universal Bot, Agent Assist, and iResolve for CX transformation. The company positions the AI subsidiary as a continuation of its engineering heritage and market positioning in IT services, which still forms 30-35% of the business.

To accelerate AI adoption, the company is relying on The Model House approach to streamline solution design and allow clients to select multi-model and multi-modal GenAI and agentic AI solutions based on business outcomes from technology providers, including Salesforce, Microsoft, NICE, AWS, and Google. One of the target applications is machine translation and accent neutralization over voice; for example, with Sanas. The ultimate goal is to combine Movate Spectrum, Movate AI, and strategic partnerships to build a technology-agnostic ecosystem.



Movate is also using GenAI to deliver tailored vertical solutions focusing on healthtech, edtech, and hyperscalers, following a model of continuously refining AI models and incorporating client feedback to align with their evolving customer expectations. Target use cases are rapidly deployable bots for customer engagement, acquisition, and retention, and employing data-driven insights in CX operations to optimize offers, renewals, loyalty programs, and win-back strategies. These deployments are often standalone to avoid long integration cycles with core client systems and serve as proofs of value before the client. In other sectors such as automotive, gaming, and compliance-sensitive scenarios, it is developing AI solutions to address more complex use cases. A new track is GenAI creation of marketing and sales content.

Movate is enhancing agent experiences through copilots, structured training, skill-building, and recognition programs under the EDGE framework. The priority is to upskill frontline staff to handle complex tasks and upsell and cross-sell. It then wants to identify the right employee profile for these higher value customer conversations. In this area, it continues to invest in partnerships with third-party platforms such as iMocha, iResolve, and amplifiAI.

For AI-powered recruitment, Movate is expanding across the entire new hire population. Next, it aims to create specific personas aligned by vertical with skills attributed to the persona, and continuously improve the skillset identified in the target agent profile. A major lever is AI simulation training. The company also looks to facilitate knowledge sharing through an AI community practice connecting delivery teams and Movate Academy. It is adopting new business development paths such as a peer council for collaborative learning on AI with prospects.

Following its Prescience Decision Solutions acquisition, Movate is expanding its CX analytics and analytics automation as standalone offerings for actionable insights and predictive analytics. The acquisition allows Movate to place data science resources closer to the client decision makers for ongoing improvement. The company is also prioritizing data services and data engineering, including AI enablement with data training and strategic partnerships such as Databricks for data transformation and with Anzena for an AI-powered insider risk platform.

Movate continues to expand its Costa Rica delivery for the U.S., especially for revenue generation activities. For its OnDemand platform, voice support was introduced in 2024, and the next priority is to develop specialized lines of business. These will include scenarios such as current drivers assisting new drivers on a ridesharing app, or specific intents managed by freelancers with micro-schedulable hours. These freelancers can be shared across clients with similar tasks, trained through dedicated learning modules, and made available to handle both planned and unplanned volume spikes.

Outlook

Movate is in a strong market position as an engineering and IT services player with a managed CX and product support business. With AI being infused in more products and services, organizations will increase their needs for specialized technical and product support and Movate could capture a greater share.

With the creation of its AI subsidiary, the acquisition and development of a partner network in data services and analytics, and the focus on revenue acceleration services, Movate is addressing major CX services market developments. These three major investment paths are essential for the upcoming AI and human support symbiosis which enables live agents and engineers to focus on interactions with value add to consumers and brands.

Another strength for the company is its experience and client portfolio in B2B support scenarios, opening up opportunities with B2C clients moving towards complex interactions and



higher-value tickets. Expect Movate to benefit from this development in the gaming, telecom, food delivery, and automotive sectors.

In talent management, Movate is targeting a sizable market need for AI-based identification of the optimal agent profile to handle complex and revenue-generating interactions and then upskilling with a comprehensive approach that heavily uses dynamic AI simulations. For end-to-end employee lifecycle management, the company could accelerate the rollout of its automated QA across the agent population.

Movate has a clear approach to funding CX transformation through outcome-based pricing with shared risks and rewards between vendor and client, to justify additional investments in incremental solutions and modules on top of the existing stacks, such as Salesforce and Zendesk. At the same time, it is experienced in alleviating client concerns about solution ownership and proprietary data protection. Expect Movate to build its partner network with niche providers to further address smaller parts of the customer journey with a larger impact on the overall experience. The company could bring forward its existing cloud enablement services to support relatively low CCaaS levels in CX organizations.

Movate is actively utilizing flexible delivery with a gig workforce element, and this capability allows it to offer cost savings and scale for highly specialized queues and skills. The gig model is well complemented by Movate's onshore and offshore site presence, but could consider additional delivery hubs in North Africa, the Middle East, or Eastern Europe in support of EMEA.

CX Services Transformation Market Summary

Overview

CX services transformation is the redesign and modernization of front office operations and organizations' ability to deliver, manage, and measure customer support and sales across the end-to-end customer journey. It involves replacing traditional service models with integrated, data-driven, and proactive approaches that enhance customer satisfaction, lower costs, and increase revenues.

The role of automation and AI in replacing live agent support and routing volumes to self-service is undisputed and the scale of this replacement will increase in 2026. While the overall addressable CX market is flat or contracting, the share of outsourced CX services is increasing because of key fundamentals around cost optimization; shifting risks from in-house AI investment for CX processes to outsourced AI investments; onshore talent shortages; and revision of the role of the contact center agent to more advocacy and specialized work (requiring critical thinking). Other contributing factors, such as machine translation and AI voice also enable cost reduction by offshoring while maintaining quality.

CX services growth by service line is shifting from more traditional LOBs such as customer care and payment processing to revenue generation, collections, content moderation, trust and safety, and even CX-adjacent work such as AI and data training. Vendors are also picking up sales of their CX-as-a-service offerings powered by AI tools (e.g., automated QA, learning and training, WFM, agent assist, customer-facing bot optimization). These trends will accelerate in 2026.

The biggest short-term (2025-2027) downward pressure on the global CXS market is not in-house technology cannibalizing outsourced human-supported volumes but in external risks – political, regulatory, security, environmental – impacting consumer confidence and overall interaction volumes (e.g., fewer mortgages or auto sales).

Revenue generation (lead generation, new sales, upsell/cross-sell, retention, and win-back) and content moderation (a range of trust and safety services, including KYC/AML, fraud prevention) are growing above the overall market average. These service lines are often more specialized, industry-specific, and require a high degree of live agent augmentation with analytics, intelligent automation, and AI assistants.

Buy-Side Dynamics

The application of customer-facing automation (e.g., chatbots, IVR, conversational AI) is the top feature for clients within CXS transformation. At the same time, satisfaction with the use of these characteristics does not exceed 3.5 (out of 5.0). Clients are most satisfied with the strength of partnerships and flexibility offered by vendors, while satisfaction with their overall transformation performance can still improve (4.0 out of 5.0). Improved customer satisfaction continues to be the top client priority and has the highest vendor effectiveness. Resource scalability and multishore delivery are falling in importance. Fulfillment and contact center back-office activities receive the highest satisfaction by CX services clients, with CX analytics offering a sizable scope for improvement.

The main drivers for the increase in outsourced CX services are:

- *Flexibility and risk reduction:* CX clients are focusing on flexibility and reducing exposure to specific locations, technologies, and in-house workforce commitments
- *Cost reduction through nearshoring and offshoring:* enterprises are under pressure to reduce costs, leading to a renewed focus on nearshoring and offshoring in partnership with outsourcing vendors
- *Lower CAPEX and AI adoption:* enterprises are aiming to reduce long-term CAPEX while introducing AI and GenAI into CX operations without upfront investment
- *Maturing emerging markets:* emerging CXS markets in Eastern Europe, Asia (especially India), LATAM, the Middle East, and parts of Africa are maturing. As domestic economies and middle-class consumer bases expand, enterprises are increasing CX quality, often through outsourcing
- *Globalization of brands:* the growing globalization of brands requires standardization of CX quality and processes across markets
- *Complexity of products and services:* increasingly complex products and services demand more technologically enabled live agent support
- *Role of automation and AI:* automation and AI are replacing parts of live agent support and driving more customer interactions toward self-service.

Market Size & Growth

The size of the CX services market (excluding collections) is ~\$113bn in 2025, growing at 4.8% CAAGR to reach ~\$136bn in 2029, with the main growth engines being sales, retention, and content moderation. The overall addressable CX market has peaked in 2023-2024, while within it, the share of global outsourced CX services is growing and expected to reach 39%-40% by 2029.

The combined European and MEA markets are the largest CX services markets, expected to reach ~\$46bn by 2029, while the APAC region is the fastest growing at 6.1% CAAGR. The U.S. remains the largest individual national market for CX services, reaching ~\$40bn by 2029. In Europe, Eastern Europe is growing at 5.4% CAAGR, with the Polish domestic market leading that growth. Among the emerging economies, India's domestic market is the fastest growing at 8.0% CAAGR through 2029 and is expected to reach ~\$5bn, with solid performance also from Brazil.

BFSI companies and healthcare payers have above-market growth rates and have a more gradual adoption of AI in CX operations while requiring more specialized services. Retail and ecommerce remain the fast growing sectors, expected to recover from softer short-term volumes from 2026 onwards. Media, gaming, and entertainment are expanding at above average CX services market rate.

Success Factors

Top vendor selection criteria are the ability to embed GenAI, agentic AI, and predictive analytics across CX, sales and operational functions; building and monetizing advanced, AI-enabled employee lifecycle management; linking AI-driven transformation to measurable financial outcomes; building modular, interoperable, and scalable CX technology ecosystems; creating strategic alliances and ecosystem participation for co-innovation and GTM acceleration; achieving scalable, flexible, and secure delivery with geographic and linguistic resilience; reaching deep vertical integration with domain-specific IP and analytics; performing

internal organizational and cultural transformation with a focus on internal readiness for AI-first business models; enhancing knowledge and insights management by harnessing data and content for operational and customer intelligence; and applying targeted regional growth to capture new client demand.

Core vendor capabilities key to success are:

- *AI & analytics innovation*: predictive models, democratized analytics, AI voice, GenAI copilots
- *Talent management*: AI recruitment, simulation training, upskilling, gig models
- *Revenue generation*: outcome-based pricing, sales-through-service, next-best-offer
- *Technology ecosystems*: CCaaS integration, low-code tools, modular and composable CX platforms
- *Partnerships*: GTM alliances, data and AI partner networks
- *Operational agility*: offshore/gig delivery, machine translation, domain-specific CoEs
- *Sector specialization*: BFSI, healthcare, automotive, telecom, utilities
- *Cultural transformation*: tech-first GTM, innovation labs, decentralized AI development, upskilled sales functions
- *Knowledge management*: AI search, knowledge-as-a-service, insights bots.

Outlook

The future global CX services market will include CX consulting and advisory, including change management, GenAI and agentic AI CX technology offered as PaaS and standalone products, and CX-adjacent services such as trust and safety, KYC/AML and financial crime prevention, B2B sales, credit and collections, AI and data training services, marketing back-office, and end-to-end CX talent management as a service (e.g., recruitment, training, QA, WFM).

Future factors impacting CX services' growth in the period 2025-2029 are:

- Accelerated adoption of GenAI/agentic AI bots for customer-facing processes
- Mass adoption of GenAI/agentic tools in CX operations, reducing costs (increasing productivity) and improving quality
- Macroeconomic performance impacting national and regional markets (e.g., growth in Poland and Spain in EMEA, growth in Mexico in LATAM)
- Delivery diversification to Asia and Africa
- Evolution of AI voice and AI translation, enabling multilingual support from offshore locations
- Clients' prioritization of sales and retention
- Changing consumer demographics with new requirements for customer-brand relationships (e.g., growth in online marketplaces).



NEAT Methodology for CX Services Transformation

NelsonHall's (vendor) Evaluation & Assessment Tool (NEAT) is a method by which strategic sourcing managers can evaluate outsourcing vendors and is part of NelsonHall's *Speed-to-Source* initiative. The NEAT tool sits at the front-end of the vendor screening process and consists of a two-axis model: assessing vendors against their 'ability to deliver immediate benefit' to buy-side organizations and their 'ability to meet future client requirements'. The latter axis is a pragmatic assessment of the vendor's ability to take clients on an innovation journey over the lifetime of their next contract.

The 'ability to deliver immediate benefit' assessment is based on the criteria shown in Exhibit 1, typically reflecting the current maturity of the vendor's offerings, delivery capability, benefits achievement on behalf of clients, and customer presence.

The 'ability to meet future client requirements' assessment is based on the criteria shown in Exhibit 2, and provides a measure of the extent to which the supplier is well-positioned to support the customer journey over the life of a contract. This includes criteria such as the level of partnership established with clients, the mechanisms in place to drive innovation, the level of investment in the service, and the financial stability of the vendor.

The vendors covered in NelsonHall NEAT projects are typically the leaders in their fields. However, within this context, the categorization of vendors within NelsonHall NEAT projects is as follows:

- **Leaders:** vendors that exhibit both a high capability relative to their peers to deliver immediate benefit and a high capability relative to their peers to meet future client requirements
- **High Achievers:** vendors that exhibit a high capability relative to their peers to deliver immediate benefit but have scope to enhance their ability to meet future client requirements
- **Innovators:** vendors that exhibit a high capability relative to their peers to meet future client requirements but have scope to enhance their ability to deliver immediate benefit
- **Major Players:** other significant vendors for this service type.

The scoring of the vendors is based on a combination of analyst assessment, principally around measurements of the ability to deliver immediate benefit; and feedback from interviewing of vendor clients, principally in support of measurements of levels of partnership and ability to meet future client requirements.

Note that, to ensure maximum value to buy-side users (typically strategic sourcing managers), vendor participation in NelsonHall NEAT evaluations is free of charge and all key vendors are invited to participate at the outset of the project.

*Exhibit 1***‘Ability to deliver immediate benefit’: Assessment criteria**

Assessment Category	Assessment Criteria
Offerings	Range of CX transformation offerings CX consulting and design capability CX analytics, automation, omnichannel, and CCaaS capability Conversational AI, GenAI, and agentic AI capability Operations transformation capability
Delivery	Scale of managed services resources Suitability of delivery North America Suitability of delivery EMEA Suitability of delivery APAC Suitability of delivery Latin America Scale and maturity of transformation resources Application of analytics and insights Application of intelligent automation Application of GenAI Application of Conversational AI Application of CCaaS Application of machine translation and AI voice Application of end-to-end talent management models Application of AI to enhance talent management Application of real time agent augmentation technology CX operations re-engineering models and frameworks CX innovation infrastructure Development of an ecosystem for CX transformation Application of flexible commercial terms & models Implementation of CX-adjacent services
Market Presence	Scale of CX transformation projects Scale of client presence in CX transformation Market momentum
Benefits Achieved	Level of customer experience improvement achieved Level of revenue enhancement achieved Level of cost savings achieved Level of operations transformation achieved



Exhibit 2

‘Ability to meet client future requirements’: Assessment criteria

Assessment Category	Assessment Criteria
Investment in CX Ops Transformation	- Investment in development of customer satisfaction - Investment in development of revenue generation capability - Investment in development of cost optimization capability - Investment in development of data services and analytics - Investment in development of Conversational AI and AI voice - Investment in development of GenAI and agentic AI - Investment in development of AI for talent management - Investment in development of end-to-end digital transformation - Investment in support of CX co-innovation and reimagination
Perceived Suitability by CXS Clients	- Perceived effectiveness in CX transformation services - Perceived effectiveness in the application of customer experience improvement - Perceived effectiveness in the application of revenue generation - Perceived effectiveness in the application of cost optimization - Mechanisms in place to deliver client innovation through CX consulting & redesign - Mechanisms in place to deliver client innovation through analytics, automation, cloud - Mechanisms in place to deliver client innovation through GenAI - Mechanisms in place to deliver client innovation through flexible delivery models - Extent to which client perceives that innovation has been delivered - Suitability of vendor to meet future needs of client - Perceived suitability as key partner

For more information on other NelsonHall NEAT evaluations, please contact the NelsonHall relationship manager listed below.

**Sales Inquiries**

NelsonHall will be pleased to discuss how we can bring benefit to your organization. You can contact us via the following relationship manager:
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