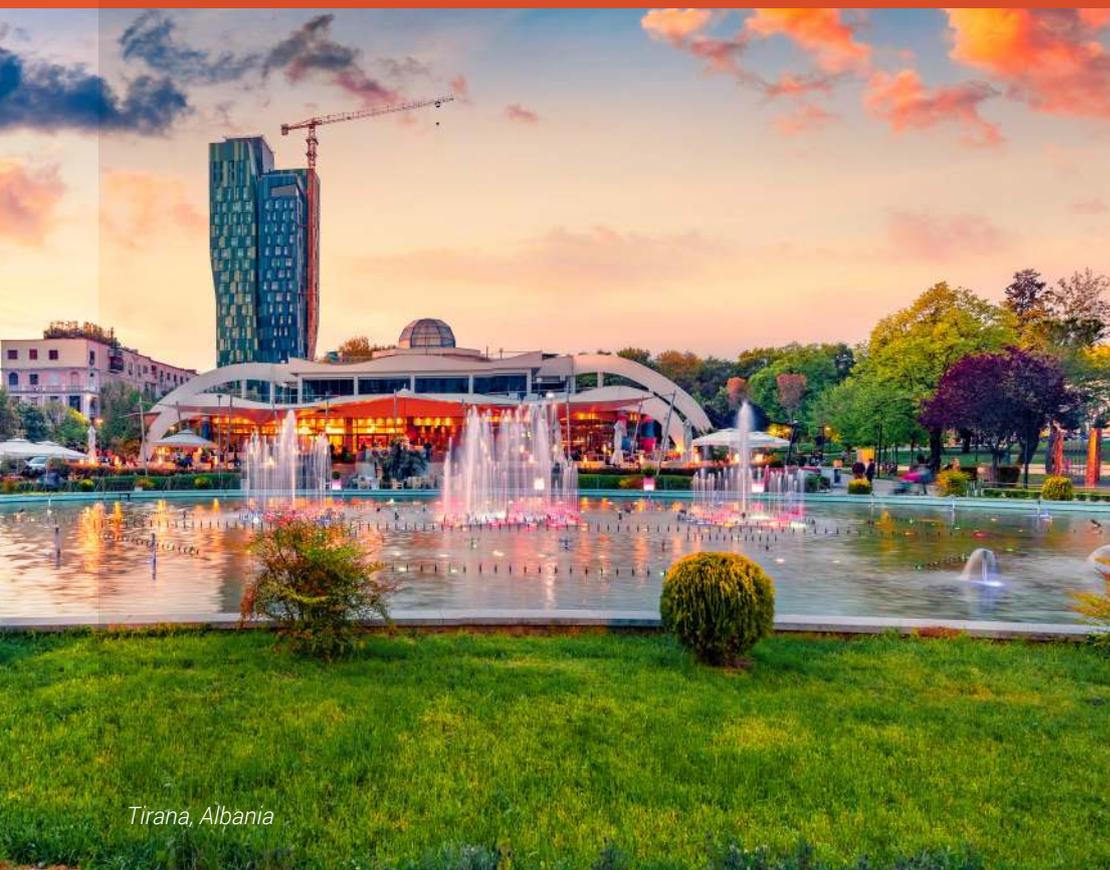


EUROPE AND THE NEARSHORE: 2025

ASSIST
DIGITAL



December
2025

INTRODUCTION

Customer experience delivery across Europe has entered a pivotal phase in 2025. After years of stagnation brought on by external shocks, regulatory pressures and technology disruption, there is renewed optimism. Inflation is easing, consumer spending is rebounding, and growth prospects are improving. EU GDP is forecast to expand by 1.5% in 2026—modest, but still the bloc’s strongest growth rate in years.¹ The rebound is restoring confidence among consumers and businesses alike.

Yet, while the macroeconomic outlook has improved, operational challenges persist. CX providers still face what is arguably the world’s most complex regulatory landscape alongside rising expectations from enterprise clients. Advanced technologies like AI are often presented as transformative solutions, but the reality is more grounded. As enterprises experiment with new technologies—often with mixed results—the delivery landscape across onshore, nearshore, and offshore models is shifting. Providers must now assess how and where to invest amid a rapidly evolving technology landscape.

How are macro-level improvements affecting enterprise decisions to invest in CX partnerships? What factors are weighing on the minds of enterprise decision-makers as they consider offshore delivery options? And how are advanced technologies impacting the shape of CX strategy in offshore locations?

These are the questions this report sets out to answer. It explores the evolving dynamics of Europe’s CX market, drawing on findings from the *2025 CX Technology & Global Services Survey* conducted by Ryan Strategic Advisory. This year’s survey captures insights from 819 executives with strategic oversight of contact center operations across a dozen major demand markets, including France, Germany, Italy, the Netherlands, Spain and the United Kingdom.



Sofia, Bulgaria

¹ European Commission, *Spring 2025 Economic Forecast* (19 May 2025): https://economy-finance.ec.europa.eu/economic-forecast-and-surveys/economic-forecasts/spring-2025-economic-forecast-moderate-growth-amid-global-economic-uncertainty_en

OUTSOURCING DYNAMICS: WHAT CLIENTS WANT

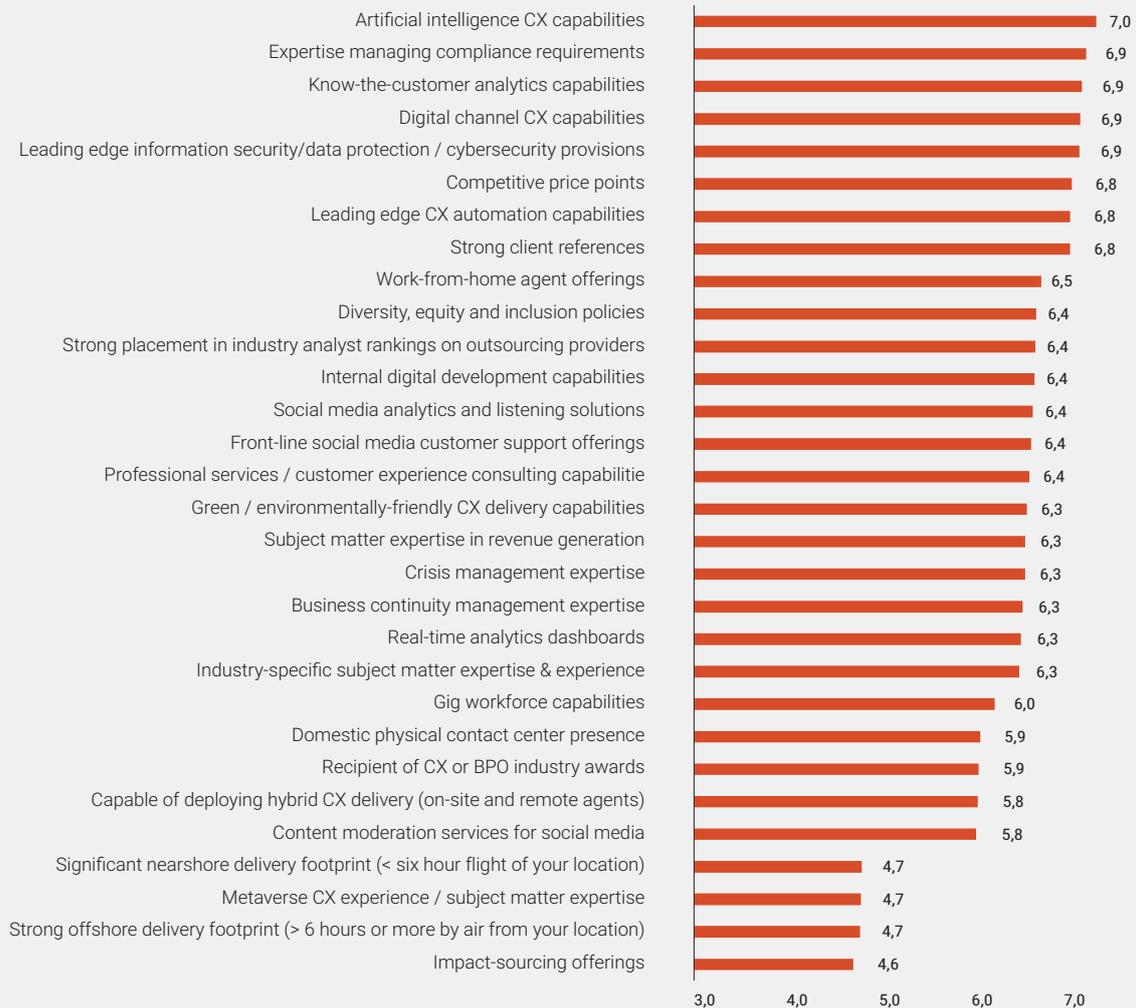
The 2025 Survey shows that while many Western European enterprises already outsource some CX functions, few plan to expand their outsourcing footprint dramatically this year. However, among firms yet to engage with BPOs, interest in nearshore options is rising—driven by operational fatigue, technology gaps, and rising internal complexity. As they weigh new partnerships, enterprises want outsourcing partners that provide AI technologies / capabilities, analytics expertise, and competitive pricing.



Bucharest, Romania

Outsourcer Competitive Advantages

What do you see as the competitive advantages that an outsourcer must have in today's market to win your business?
(1=not important, 8=very important) – European respondents only



Source: Ryan Strategic Advisory, CX Technology and Global Services Survey 2025

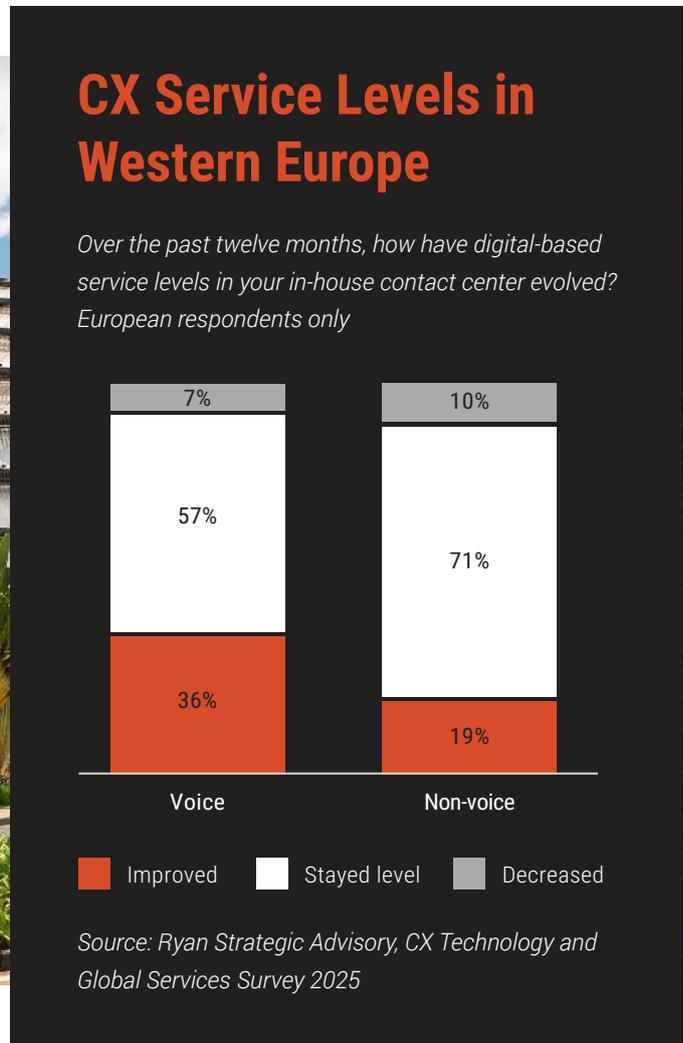
While evidence of this trend emerged years ago, until recently this preference was seen as a luxury. That’s no longer true. Advanced technologies are no longer optional ‘bells-and-whistles’ but a strategic necessity. In both the UK and Germany, Know Your Customer analytics are increasingly valued, particularly given the paramount priority both markets place on adherence to global data protection treaties.

French enterprises, meanwhile, see AI as a way to improve service quality and language coverage, especially in hybrid or multilingual settings. However, AI is not a cure-all. Across industries, 42% of companies have ended AI initiatives this year, up from only 17% in 2024.² And in CX, implementation of advanced tech—including gen AI—is not yet sufficient to reverse declining performance trends.

Survey data shows that in Western Europe less than 40% of enterprises observed an improvement in voice-based service levels; digital channels performed significantly worse.³ In some markets, declines in service levels may be responsible for eroding confidence in fully remote delivery models.



Kigali, Rwanda



Today, riding the AI hype-cycle isn’t enough. European enterprises now demand CX partners that can turn analytics, cyber-security safeguards, and yes, AI, into real results—faster resolutions, smarter training, higher satisfaction, and more streamlined workflows.

² S&P Global, “AI Experiences Rapid Adoption, but with Mixed Outcomes” (30 May 2025).

³ Ryan Strategic Advisory, CX Technology and Global Services Survey 2025, p.48.

ASSIST DIGITAL: TRANSFORMING CX THROUGH AGILITY, INTELLIGENCE, AND HUMAN INSIGHT



In a CX landscape increasingly shaped by AI, automation and global scalability, one truth remains: great service still depends on understanding people. Assist Digital, a pan-European CX transformation company, has built its success on that principle, blending digital innovation with deep human empathy to help some of the world's best-known brands create customer experiences that truly matter.

As enterprises embrace AI to optimize their customer operations, many face the same challenge: distinguishing between real intelligence and marketing hype. "AI" may appear in every vendor presentation, but only a few providers translate it into measurable outcomes. Assist Digital does by embedding intelligence across the entire customer journey, from design to delivery.

A DIGITAL-FIRST HERITAGE

For Assist Digital, digital transformation is part of the company's DNA. Founded more than 20 years ago as a consultancy combining digital strategy with customer insight the company has grown into a full-service transformation partner that unites consulting, AI and data, and intelligent operations.

Today, Assist Digital delivers integrated enterprise services that enhance every stage of the customer relationship from marketing and sales to post-sales service. Its approach fuses AI, agentic AI, and data-driven technologies to help clients operate smarter, faster, and more efficiently.

INTELLIGENT OPERATIONS: EMBEDDING AI AT THE CORE

The Assist Digital intelligent operations model seamlessly combines technology, processes, and people to create adaptive, insight-led CX.

Through intelligent operations, Assist Digital helps organizations transition from reactive service models to AI-infused enterprises that predict customer needs, automate intelligently, and continuously learn. The focus is on value creation, not just cost reduction.

This approach transforms four critical dimensions of CX:



Experience

Customers benefit from a consistent, unified journey across all channels, supported by complete visibility and insight.



Efficiency

Businesses gain productivity and scalability through automation, smart routing, and embedded upselling opportunities.



Integration

Assist Digital ensures full interoperability with client systems, building connected ecosystems rather than standalone solutions.



Transparency

Real-time dashboards and unified KPIs offer actionable insights that enhance accountability and performance.

The outcome is a smarter, data-enriched CX operation where every interaction contributes to learning and improvement.



Assist Digital, Contact Center



INTELLIGOO: TURNING CONVERSATIONS INTO STRATEGY

To make this vision real, Assist Digital created Intelligoo, a modular, generative AI conversational suite that captures and analyses 100% of customer interactions across email, chat, voice, and social channels.

Where most solutions stop at sentiment analysis, Intelligoo goes further. It learns, evolves, and adapts, turning conversations into a continuous feedback loop that drives both strategic and operational improvement.

The platform understands what customers mean, identifies what drives their behaviors, and pinpoints opportunities to act. It uncovers the reasons behind churn, helps teams optimize scripts and workflows, and identifies moments that matter most to customers.

This intelligence is shared across business functions, helping organizations:

- Improve service quality through targeted coaching and feedback.
- Optimize sales performance with predictive purchase insights.
- Enhance marketing and communication with real customer data.
- Unify demographic, behavioral, and transactional data for a single customer view.

The result is a cycle of continuous improvement, where every conversation fuels smarter decisions and measurable outcomes.

“Intelligoo reflects our philosophy that AI should empower human creativity and empathy,” says Dario Petricone, Head of CMS Intelligent Operations “By turning unstructured data into clear insights, we help organizations become more adaptive and truly customer-centric.”



Assist Digital, Contact Center

AGILITY THAT DELIVERS REAL VALUE

Beyond technology, Assist Digital's strength lies in its operational agility. With a network of delivery centers across EMEA, the company can adapt its service model to each client's needs, providing onshore, nearshore, or offshore solutions without compromising quality.

A recent example is its collaboration with a client in Spain seeking a more scalable and sustainable service model. Rather than reducing scope or service quality, Assist Digital leveraged its existing operational footprint to establish a dedicated hub in Morocco. This new site delivered both performance and value, providing multilingual CX excellence at a more cost-efficient level.

"Our flexibility allows clients to optimize their operations without trade-offs," explains Elona Ymeri, Service Delivery Manager "We help them spend smarter, not less, delivering efficiency through intelligent design and smart location strategy."



Our flexibility allows clients to optimize their operations without trade-offs. We help them spend smarter, not less, delivering efficiency through intelligent design and smart location strategy.

Elona Ymeri
Service Delivery Manager,
Assist Digital

This operational flexibility is made possible by Assist Digital's pan-European presence. Its teams share cultural affinity, linguistic capability, and a deep understanding of European markets that enhance both collaboration and customer rapport.

Being close to clients also fosters innovation. It allows for faster deployment, continuous improvement, and co-creation of solutions that reflect each brand's unique identity.



Assist Digital, Contact Center

CX TRANSFORMATION WITH A HUMAN HEART

While technology drives efficiency, Assist Digital never loses sight of the human connection at the heart of CX. Its approach is grounded in collaboration, trust, and partner values that have led to long-standing relationships with leading global brands.

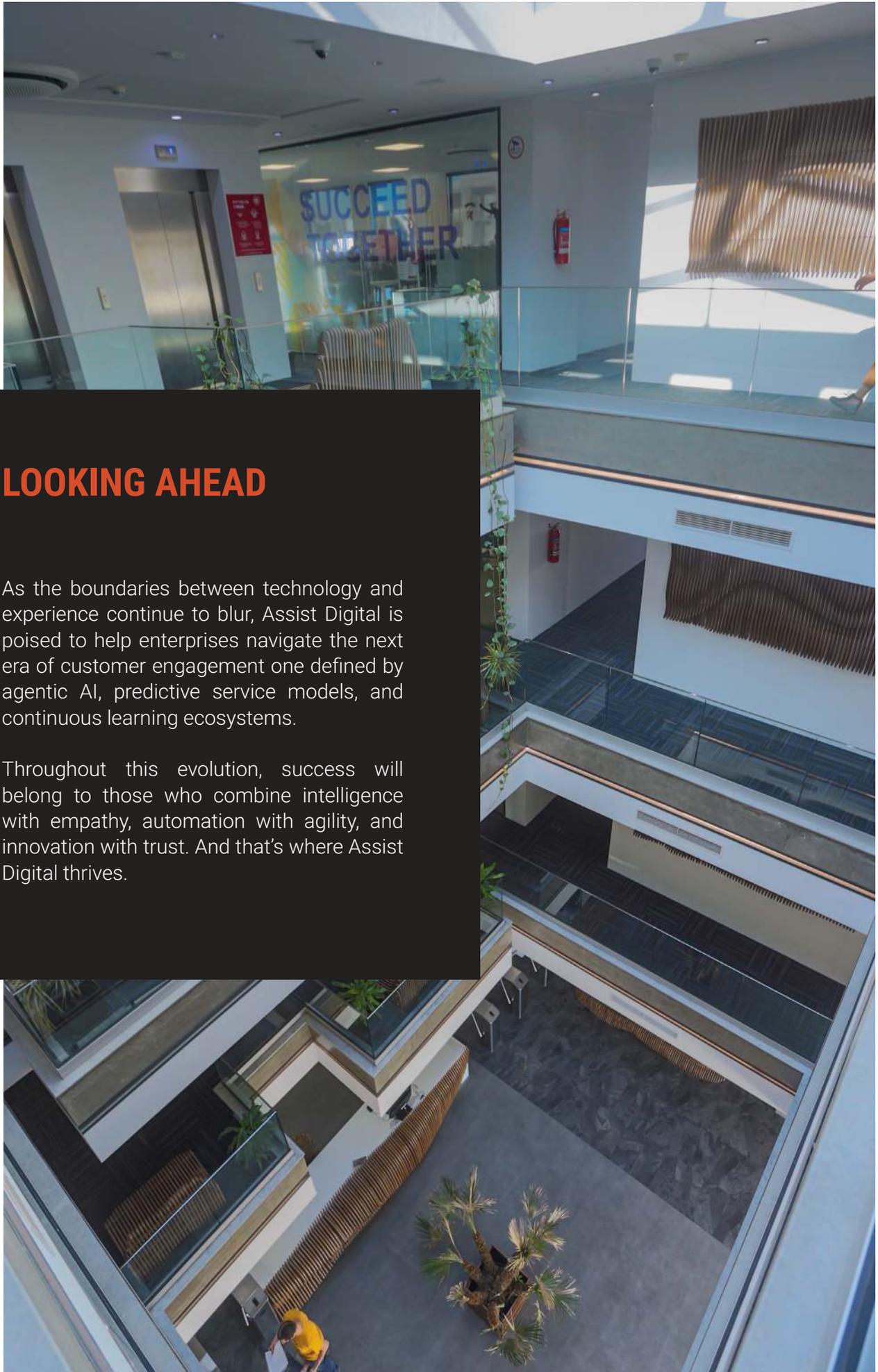
Working side by side with clients, Assist Digital's teams help define strategies, co-design solutions, and continually refine processes. This collaborative model ensures that technology serves real business outcomes including improved satisfaction, loyalty, and growth.

"We see ourselves not as a supplier, but as a partner in transformation," says Manlio Costantini, Executive Director and Board Member. "Every client engagement is about building something lasting a smarter, more adaptive organization that thrives on customer trust."



We see ourselves not as a supplier, but as a partner in transformation. Every client engagement is about building something lasting a smarter, more adaptive organization that thrives on customer trust.

Manlio Costantini
Executive Director and Board Member, Assist Digital



LOOKING AHEAD

As the boundaries between technology and experience continue to blur, Assist Digital is poised to help enterprises navigate the next era of customer engagement one defined by agentic AI, predictive service models, and continuous learning ecosystems.

Throughout this evolution, success will belong to those who combine intelligence with empathy, automation with agility, and innovation with trust. And that's where Assist Digital thrives.

REBALANCING THE DELIVERY MODEL



Bratislava, Slovakia

One of the most consequential shifts in 2025 is the growing preference for on-site CX delivery. Following years of remote experimentation, more than half of European enterprises now deliver at least 30% of their CX services from physical contact centers. France and the Netherlands are among the most on-site reliant markets in the world for CX delivery. Across Europe, enterprises cite improved quality control, compliance, and team cohesion as key drivers for renewed on-site delivery.

Hybrid delivery remains relevant but is no longer the default in Europe or otherwise. In a few use cases, such as multilingual hubs or seasonal scaling, hybrid or remote-first models retain favor. But for nearshore partners, the implication is clear. On-site delivery still counts, and thus factors such as physical infrastructure, site security, and workforce management capabilities will be critical differentiators.

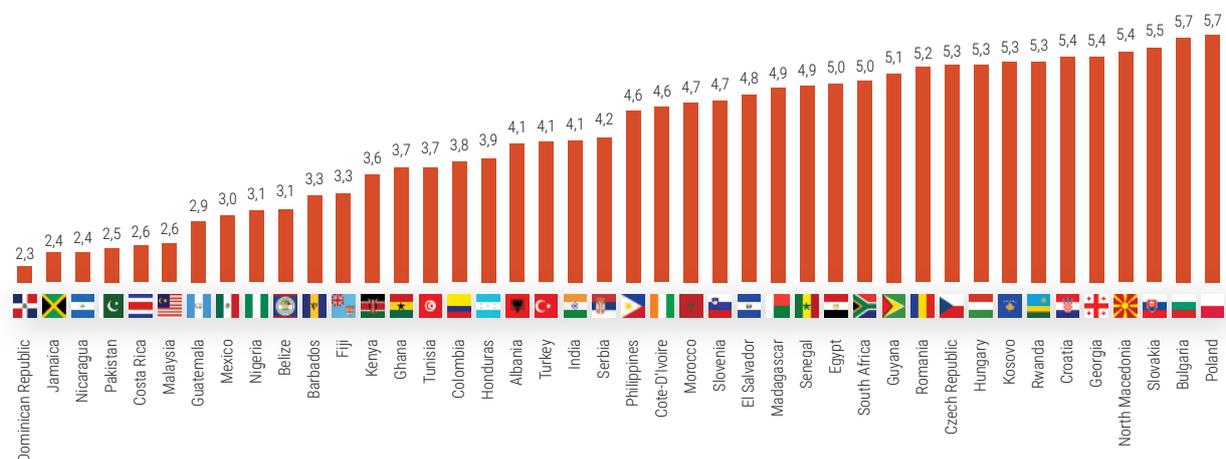


REGIONAL DYNAMICS: DEMAND CONCENTRATES IN CENTRAL EUROPE AND NORTH AFRICA

In 2025, the most strategically aligned nearshore destinations for European enterprises remain Central and Eastern Europe (CEE) and North Africa. For firms catering to consumers in the Netherlands and Germany, Poland and the Czech Republic remain indispensable.

Netherlands Offshore Location Favorability

Provide your degree of favorability (1=not favorable, 8=very favorable) for the following locations for contact center delivery.



Source: Ryan Strategic Advisory, CX Technology and Global Services Survey 2025, p.126.

Poland’s status as a CX leader continues, not only because of its multilingual labor pool but also due to its large number of engineers and tech grads. Beyond Warsaw and Kraków, secondary cities such as Lublin, Poznan and Wrocław are expanding their CX footprints, offering access to relatively untapped talent markets.

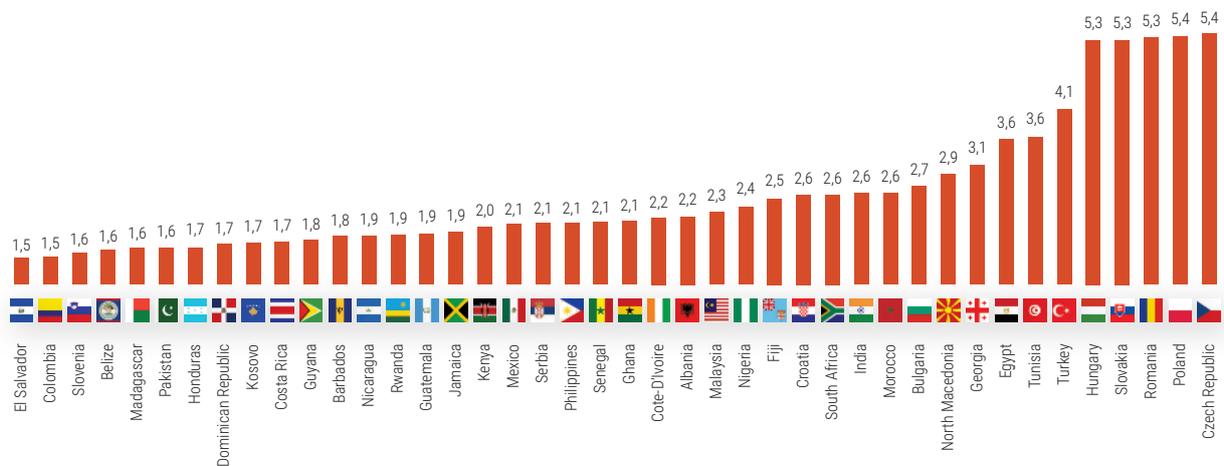
Regulatory alignment is another crucial benefit offered by CEE destinations. Poland and the Czech Republic, in particular, enjoy high favorability because of their alignment with EU standards—vital when it comes to financial services and healthcare—as well as their use of advanced tech to enhance agent productivity.



Gdansk, Poland

Germany Offshore Location Favorability

Provide your degree of favorability (1=not favorable, 8=very favorable) for the following locations for contact center delivery.



Source: Ryan Strategic Advisory, CX Technology and Global Services Survey 2025, p.128.

Romania's continued ascent is powered by linguistic depth and tech proficiency. Cluj-Napoca complements Bucharest as a high-capacity hub capable of serving clients with complex CX needs. Romania’s EU membership also secures its position as a compliance-friendly option.



Cairo, Egypt

NORTH AFRICA

In North Africa, Morocco and Egypt continue to receive strong favorability scores from enterprise CX decision-makers. French firms view Morocco almost as an extension of their domestic market, with Casablanca, Rabat, and Tangier serving as established delivery centers. Morocco's relative political stability and cultural alignment with France reinforce its role as a premier nearshore destination.

Egypt retains its strategic appeal due to its scale, multilingual workforce, and growing CX specialization. Its ongoing inclusion among the top five most favored offshore destinations globally reflects its cross-market relevance, but it is especially valued by European clients for its blend of technical capabilities and price competitiveness. While saturation concerns at times enter sourcing conversations regarding Cairo, Alexandria is rapidly gaining ground as a preferred site. Egypt's port city boasts lower attrition rates than what's often found in the capital. And *A/lex* has a multilingual heritage that enables scalable CX recruitment in English, French, German, Italian and Spanish.

Egypt's Offshore Favorability

Average ratings of CX Decision-Makers in respective markets
(1=not favorable, 8=very favorable)



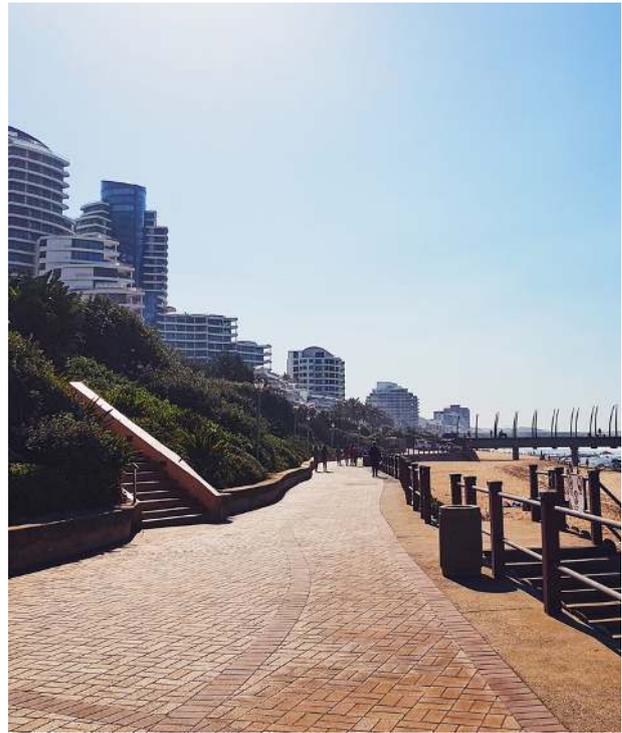
Source: Ryan Strategic Advisory, CX Technology and Global Services Survey 2025, pp.120-130.

Tunisia remains a promising secondary market for French enterprises. Improved network infrastructure, combined with strong human capital in urban areas like Tunis, bolster its position. While smaller in scale than Egypt or Morocco, Tunisia offers a focused and highly adaptable CX environment.

SUB-SAHARAN AFRICA

Parts of sub-Saharan Africa, while further away from Western Europe and less penetrated by large outsourcers, are gaining traction. In fact, CX decision-makers eyeing the Dutch market appear to favor the region more than CEE.

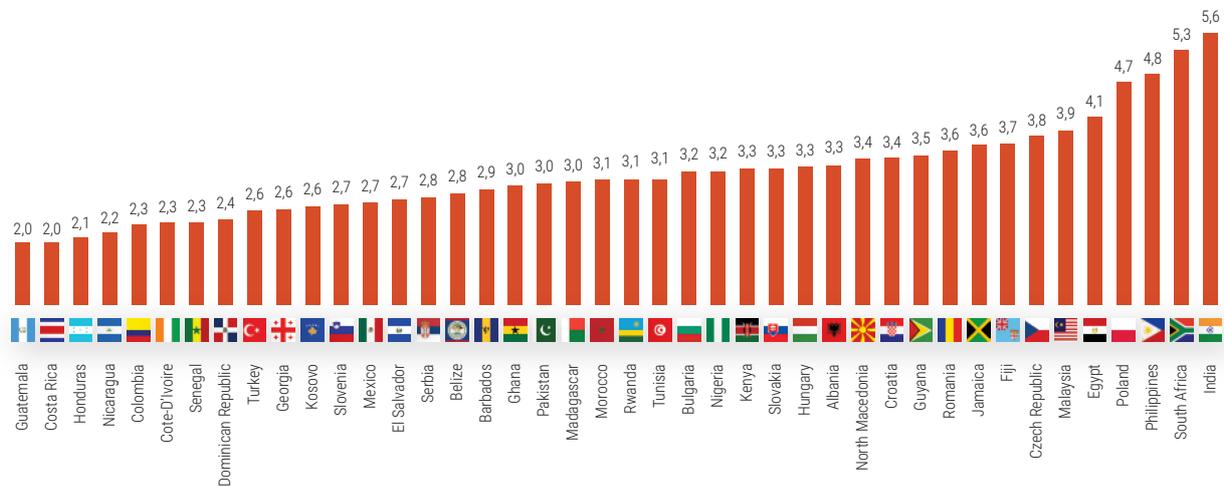
South Africa continues to perform well among UK enterprises. This country is viewed as especially effective for voice-based support, including scalable access to fluent English speakers and time-zone alignment. Although fully loaded costs have crept up in Cape Town, high penetration of the South African market has led to ongoing growth in Johannesburg, Durban, Gqeberha (Port Elizabeth) and Paarl.



Durban, South Africa

United Kingdom Offshore Location Favorability

Provide your degree of favorability (1=not favorable, 8=very favorable) for the following locations for contact center delivery.



Source: Ryan Strategic Advisory, CX Technology and Global Services Survey 2025, p.120.

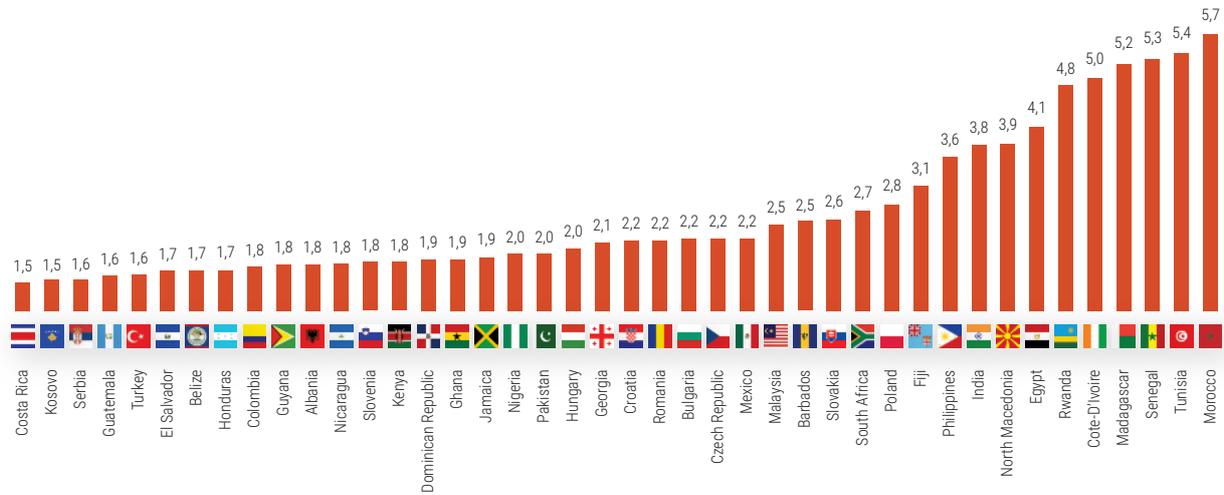


Nairobi, Kenya

Elsewhere, Rwanda and Kenya resonate for their English-language voice offerings and growing operational maturity. And Nigeria continues to gain favorability thanks to its voice-based English CX and capacity to scale KPO solutions. Meanwhile Senegal, Madagascar, and Côte d'Ivoire enjoy notable degrees of favorability as French-language destinations.

France Offshore Location Favorability

Provide your degree of favorability (1=not favorable, 8=very favorable) for the following locations for contact center delivery.



Source: Ryan Strategic Advisory, CX Technology and Global Services Survey 2025, p.127.

In recent years, talk of “emerging Africa” has once again gained the attention of outsourcers. The pitch involves heavy emphasis on an investment’s potential to not only transform the lives of employees, but to ignite social benefits that improve wider communities. Certainly, uplifting press accounts of the virtuous cycle underway in Kenya and elsewhere are heartwarming.

However, the data points to more concrete commercial reasons: Sub-Saharan Africa’s growth as a BPO destination involves the identification of clear pockets of human talent with language and CX skills. To a lesser degree, government incentives and solid digital infrastructure hold sway. By contrast, ‘impact sourcing offerings’ is one of the lowest priority attributes for an outsourcer to possess in a bid to win new contracts.⁴



A clutch of nations with populations of less than 4 million have, despite their size, emerged on the radar of Western European buyers seeking service delivery within the EU. Croatia and Slovenia both offer competitive labor costs, and each has a growing talent base of English and Italian speakers. Hence, they appeal for CX services in Italy.

Ljubljana, Slovenia

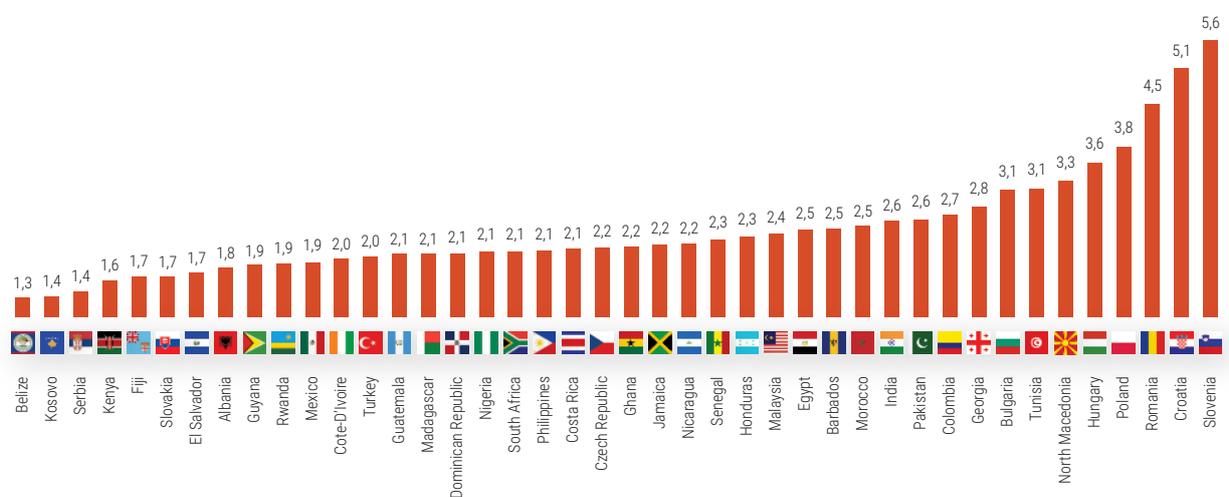
⁴ Ryan Strategic Advisory, CX Technology and Global Services Survey 2025, p.89.



Tbilisi, Georgia

Italy Offshore Location Favorability

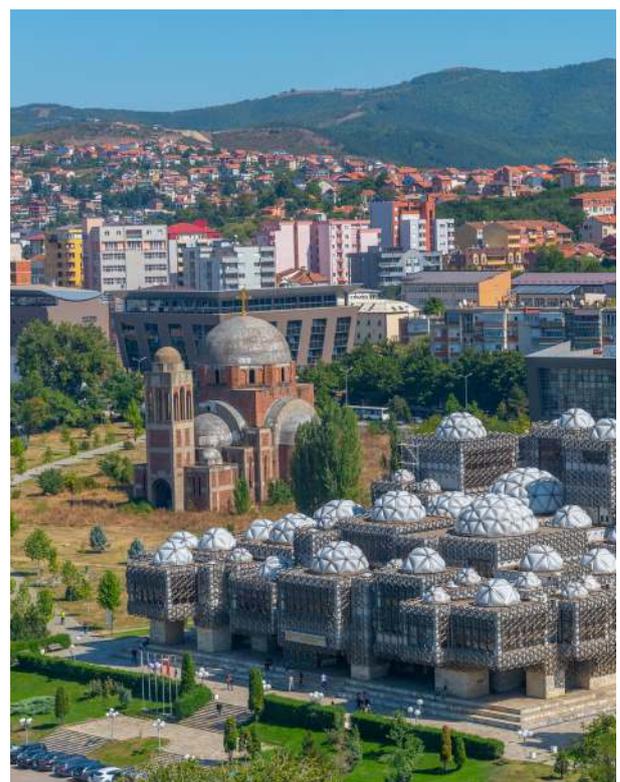
Provide your degree of favorability (1=not favorable, 8=very favorable) for the following locations for contact center delivery.



Source: Ryan Strategic Advisory, CX Technology and Global Services Survey 2025, p. 129.

North Macedonia and Georgia have also gained attention from outsourcers. Historically, both countries lie along the crossroads of large, influential civilizations. Over time, this has nurtured a multilingualism that today strengthens CX labor pools. Yet, each country offers its unique advantages. Georgia promises impressive tax incentives and ease of startup, while the North Macedonian capital of Skopje offers greater proximity.

Capacity exists for BPO expansion in the Balkans. Serbia and Kosovo clearly possess the human talent and cost features to attract and support vibrant outsourcing sectors. Over the medium term, consideration of these markets will involve balancing the desire for pockets of CX potential with perceptions of limited scalability and geopolitical risk.



Pristina, Kosovo

CONCLUSION: THE STRATEGIC ROLE OF THE NEARSHORE

In 2025, nearshore delivery has moved from being a convenient alternative to a foundational element of Europe's customer experience ecosystem. As economic conditions improve but operational pressures persist, enterprises must navigate a complex mix of rising consumer expectations, technology innovations and stringent regulatory demands. Nearshore partnerships offer a critical path forward—balancing quality, cost-efficiency, compliance, and innovation.

The 2025 Survey results highlight how European firms are modifying delivery models. Central and Eastern Europe continues to attract UK, Dutch, and German enterprises seeking multilingual talent and digital maturity within an EU-aligned framework. For French firms, North Africa—particularly Morocco and Tunisia—offers not only linguistic and cultural affinity but also niche specialization. Meanwhile, sparks of service delivery innovation have ignited BPO sectors in places as distinct as the Balkans, sub-Saharan Africa, and the Caucasus.



Tirana, Albania

Enterprises are no longer merely outsourcing tasks—they are seeking strategic partners capable of driving performance through advanced technologies, resilient workflows, and robust compliance. Nearshore destinations that can deliver on these expectations will remain indispensable to the future of European CX.

Ultimately, the nearshore is not a stopgap but a strategic lever. It enables European enterprises to remain agile, meet rising standards, and future-proof their service delivery in a market defined by complexity and transformation.

RYAN
STRATEGIC
ADVISORY

For more information please visit www.ryanadvisory.com.