ISG Provider Lens®

# Telecom, Media and Entertainment AI-Native Transformation Services – Telecom Transformation and Engineering Services



AI-native engineering transforming networks, software and digital platforms across the telecom lifecycle

Customized report courtesy of:

**Hitachi Digital**

**QUADRANT REPORT | OCTOBER 2026 | GLOBAL**

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# Executive Summary

*Report Author: Yash Jethani*

**AI-native engineering unifies programmable telecom and multi-orbit connectivity**

The global telecom transformation and engineering services market is entering a new phase, with AI evolving from a standalone productivity tool into a core architectural and operational foundation. Communications service providers (CSPs) are modernizing networks, software and business platforms around cloud-native, software-defined and API-driven principles, while embedding GenAI and agentic AI across engineering workflows. Meanwhile, satellite and non-terrestrial networks are becoming integral to commercial connectivity strategies by extending terrestrial networks through multi-orbit coverage, hybrid orchestration and direct integration with telecom core, RAN, cloud and business systems.

The 2026 study addresses these developments through two connected but structurally different quadrants: AI-led Telco Engineering and Software Services and Satellite and Non-Terrestrial Network (NTN) Services. The first evaluates the providers' ability to modernize and engineer telecom software and network environments using AI-native methods. The second assesses providers that integrate satellite ground, network software and multi-orbit capabilities with commercial terrestrial telecom and enterprise environments.

To understand how these developments are reshaping provider demand, it is necessary to examine the architectural and operational changes influencing the market.

**Market context**

Telecom enterprises are progressing from cloud migration and digital modernization toward composable, intelligence-driven operating models. The objective is no longer limited to virtualizing network functions or migrating applications. Operators must now increasingly connect network engineering, software development, OSS/BSS, cloud infrastructure, assurance, data and monetization through shared context and orchestration.

**AI-native engineering** is becoming the **control layer** for **programmable telecom.**


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This shift is raising expectations for engineering service providers. Conventional software development, systems integration and staff augmentation are giving way to AI-assisted requirements management, code generation, refactoring, test automation, infrastructure validation, observability and closed-loop optimization. Leading propositions combine these capabilities with domain models, telecom ontologies, agent frameworks, governance layers and access to operational data. The emphasis is increasingly shifting from providing access to AI models toward engineering complete, governed and context-aware systems capable of performing transactional work.

Open architectures are also gaining strategic importance. TM Forum Open APIs and Open Digital Architecture, CAMARA and GSMA Open Gateway, 3GPP standards and O-RAN frameworks are helping operators reduce architectural coupling and expose network capabilities more systematically. However, open technology alone does not eliminate complexity. Multi-vendor environments require stronger integration, interoperability testing, lifecycle automation, accountability and service assurance.

The satellite and NTN markets add another dimension to the rising complexity in the future of connectivity. Commercial operators increasingly view satellite connectivity as part of a hybrid network architecture rather than a completely separate technology environment. Integration must span multi-orbit connectivity, ground infrastructure, satellite network management, gateways, cloud platforms, telecom core and RAN, OSS/BSS, service assurance and commercial lifecycle management. The Satellite & Non-Terrestrial Network (NTN) Services quadrant, therefore, focuses on service-led engineering, integration and operations rather than constellation ownership, satellite manufacturing or standalone hardware products.

As these market forces converge, enterprise attention is shifting from technology adoption toward the practical engineering, integration and governance priorities required to deliver value at scale.

**Enterprise priorities**

**AI-led telecom engineering priorities**

Telecom buyers are prioritizing the modernization of heterogeneous estates without introducing another layer of fragmentation. This means transitioning legacy platforms toward microservices, containers, DevSecOps, CI/CD and API-first architectures while retaining service continuity across network and business systems.

This transformation spans operations support systems and business support systems (OSS/BSS) and the software development lifecycle (SDLC), with CSPs working alongside network equipment providers (NEPs) to modernize IP Multimedia Subsystem (IMS) environments and other network platforms. Emerging agentic approaches use agent-to-agent (A2A) communication and the Model Context Protocol (MCP), supported by software development kits and application programming interfaces (SDKs/APIs), to connect AI agents, engineering tools and telecom domain data.

Five priorities are particularly prominent:

- **Industrialising AI across the engineering lifecycle:** Operators seek measurable improvements in requirements analysis, development, testing, release management and infrastructure validation, not standalone developer copilots.
- **Modernizing OSS/BSS and network software together:** Providers must connect RAN, core network, telco cloud, devices and OSS/BSS engineering rather than treating network and IT transformation as separate programs.
- **Progressing toward autonomous networks:** Digital twins, intent-based orchestration, telemetry, agents and closed-loop automation are becoming building blocks for more adaptive networks.
- **Enabling programmable network ecosystems:** Operators are investing in Open Gateway, CAMARA and TM Forum-aligned interfaces to expose network capabilities and support ecosystem-based services.


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- **Strengthening governance and portability:** As operators use provider IP, hyperscaler platforms, foundation models and domain-specific agents, they seek clarity around integration ownership, security, model governance, observability and exit options.

Thus, the strongest providers are those that combine telecom-domain knowledge, software and network engineering, reusable assets, multi-vendor laboratories and global delivery capacity. The underlying study also observes that production-scale deployments and quantified outcomes remain uneven, making validation of live engineering benefits an important buying requirement.

Network engineering increasingly covers radio access networks (RAN), Open RAN (O-RAN) and virtualized RAN (vRAN), together with element management systems (EMS), radio frequency (RF) engineering and Citizens Broadband Radio Service (CBRS) environments. Providers are applying automation to reduce the mean time to detect (MTTD) and mean time to repair (MTTR), while limiting keep-the-lights-on (KTLO) effort. This requires expertise in network functions virtualization infrastructure (NFVI), software-defined networking (SDN), open digital architecture (ODA), cloud-native and virtual network functions (CNFs/VNFs), assembly, integration and testing (AIT), 5G New Radio (NR) and next-generation Node B (gNodeB) engineering.

**Commercial satellite and NTN priorities**

Commercial buyers are focusing on integration points that convert satellite connectivity into a manageable telecom service. Priorities include ground segment modernization, multi-orbit network management, 5G and NTN interoperability, cloud-native gateways, service orchestration, data integration and AI-enabled assurance.

Satellite engineering requirements extend across satellite control centers and ground mission infrastructure (SSC/GMI), telemetry, tracking and command (TT&C), launch and early orbit phase (LEOP) services and very small aperture terminal (VSAT) environments. Providers must integrate these capabilities with terrestrial networks, cloud and operational platforms while supporting standards and programs associated with organizations such as the European Space Agency (ESA).

Telecom operators need NTN capabilities to integrate with established commercial processes, including service activation, inventory, billing, assurance, customer management and partner settlement. This creates opportunities for providers that can bridge space-domain engineering with terrestrial telecom architecture and operations.

A key challenge is fragmentation. Satellite operators, ground system specialists, telecom vendors, hyperscalers, device ecosystems and systems integrators offer different technologies and operating models. Enterprises should therefore favor modular integration architectures that maintain visibility across terrestrial and non-terrestrial components and avoid dependence on a single satellite, cloud or network ecosystem.

Competition in the software-defined satellite market is also intensifying as established aerospace leaders such as Thales Alenia Space (Space INSPIRE), Airbus (OneSat), Lockheed Martin (SmartSat), Maxar and Boeing/Northrop Grumman increasingly converge on flexible, reconfigurable architectures that enable mission changes, dynamic capacity allocation and software-driven payload management. Meanwhile, a new generation of disruptors, including SWISSto12, Astranis and Aerospacelab (not part of this IPL® report), is challenging traditional business models with low-cost, modular and rapidly deployable platforms. This growing mix of defense primes, commercial satellite manufacturers and agile new entrants is accelerating innovation while increasing pricing pressures and differentiation challenges across GEO, MEO and LEO markets.

As competition intensifies, satellite providers are prioritizing software-defined architectures, AI-driven operations, multi-orbit orchestration and seamless integration with terrestrial 5G/NTN networks. Meanwhile, geopolitical tensions and sovereign connectivity requirements are increasing investment in secure, resilient and defense-focused platforms, while new entrants are placing pressure


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on incumbents to reduce costs, accelerate deployment cycles and expand software- and services-led revenue models.

These priorities are also reshaping provider selection, with buyers increasingly evaluating firms based on their domain depth, engineering capabilities, ecosystem reach and ability to demonstrate production-scale outcomes.

**Provider dynamics**

**AI-led Telco Engineering and Software Services**

The competitive landscape consists of four principal provider archetypes.

**Telecom vertical specialists** such as Amdocs and Prodapt differentiate through deep expertise in OSS/BSS, orchestration, fiber and operational workflows. They embed this domain expertise directly into AI agents and engineering frameworks, making them particularly relevant when transformation depends on a detailed understanding of telecom processes and brownfield environments.

**Scaled enterprise transformation providers,** including Accenture, Capgemini, HCLTech, Infosys and Tech Mahindra, combine global delivery, ecosystem partnerships and a broad network, cloud and software modernization capabilities. Their competitive edge is the ability to mobilize multidisciplinary teams for large, multi-country transformation programs. They differentiate in terms of telecom-specific AI assets, engineering automation, acquired IP, industry laboratories and evidence that agentic approaches can operate at production scale.

**Product and platform engineering specialists,** including LTTS, Hitachi Digital with GlobalLogic, Persistent Systems and UST, bring software-first and ER&D-led capabilities. They are strongest where engagements require embedded software, chip-to-cloud engineering, RAN and O-RAN development, network product ownership, complex testing or multi-vendor validation. Their opportunity lies in translating technical engineering depth into repeatable, globally scalable AI-native transformation propositions.

**Horizontal platform and infrastructure orchestrators,** represented prominently by IBM, focus on hybrid cloud foundations, open infrastructure, intent-based automation, AI governance and multi-vendor orchestration. These providers are relevant when buyers require a neutral control, data or governance layer across diverse network and IT environments.

The market's emerging challengers add further competitive pressure. Infinite Computer Solutions is advancing through carrier-grade telecom engineering, OSS/BSS depth and agentic software-development assets, while Virtusa combines telecom software modernization, orchestration and AI-assisted engineering. Their future positioning will depend on converting differentiated assets into repeatable production references across the broader telecom engineering stack.

**Satellite and Non-Terrestrial Network Services**

The commercial satellite and NTN ecosystem has four relevant provider cohorts..

**Full-lifecycle space and mission engineering providers,** including Airbus Defence and Space, Thales, Leonardo and Indra, bring extensive satellite, ground system and space software engineering experience. Within the commercial scope, their relevance lies in complex ground infrastructure, communications integration, operational resilience and large-scale space engineering. The commercial assessment should remain focused on enterprise and operator-facing services, excluding provider activities specific to government and defense missions.

**Satellite ground and network software specialists,** notably Kratos and ST Engineering iDirect, concentrate on ground segment software, satellite network management, gateways, modem environments and software-defined infrastructure. Their domain depth is valuable as operators move toward virtualized ground systems and more flexible multi-orbit connectivity. However, buyers should distinguish service-led transformation and integration from product-led propositions.

**Terrestrial-to-NTN convergence leaders,** particularly Capgemini and Tech Mahindra, approach NTN from telecom engineering, 5G core, cloud, OSS/BSS and network-orchestration perspectives. Their differentiation


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lies in their ability to incorporate satellite connectivity into existing operator architectures and commercial processes. HCLTech, identified as a Rising Star in this area, is extending its telecom engineering capabilities toward satellite and NTN integration.

**Digital transformation and space engineering providers** address complementary layers. Accenture applies cloud, data, AI and enterprise integration to satellite ecosystems. Akkodis contributes embedded software, systems engineering and engineering talent, while CGI brings space software, ground systems and mission control heritage that can be applied to broader commercial NTN environments.

Although providers approach the opportunity from different starting points, their competitiveness will depend on how effectively they integrate these capabilities into open, governed and commercially repeatable transformation models.

**Outlook**

The two markets will become increasingly interconnected over the next five years. AI-native software engineering will underpin hybrid network design, while NTN integration will expand the boundary of telecom engineering from terrestrial infrastructure into multi-orbit connectivity and software-defined ground environments.

By the next stage of market development, competitive leadership will depend less on the number of AI tools or partnerships a provider can list and more on its ability to demonstrate four outcomes:

1. **Production-scale engineering improvement,** supported by measurable development, testing, deployment and operational results.
2. **End-to-end architectural coverage,** connecting network, cloud, OSS/BSS, data, devices and satellite integration where relevant.
3. **Open and governed orchestration,** with clear controls for agents, models, data, APIs and multi-vendor accountability.
4. **Commercial repeatability,** converting laboratories, accelerators and specialist expertise into reusable offerings and sustainable operating models.

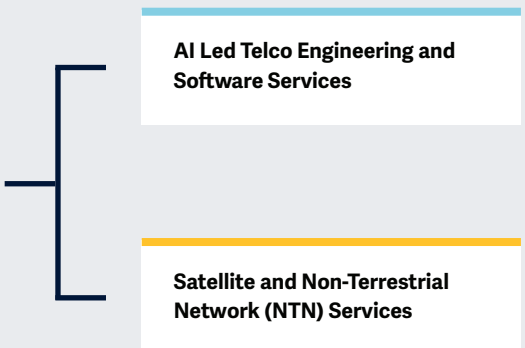
Telecom enterprises should evaluate providers according to the architecture and problem being addressed rather than selecting purely on provider size. Vertical specialists may be best suited to domain-intensive OSS/BSS transformation; scaled integrators to complex global programs; ER&D providers to network-product and embedded engineering; horizontal orchestrators to hybrid cloud governance; and satellite specialists to ground and multi-orbit environments.

Ultimately, the market is moving toward a unified engineering model in which AI, cloud-native software, programmable networks and multi-orbit connectivity are designed as interdependent components. Providers that can combine these capabilities while maintaining openness, operational accountability and measurable value will be best positioned to lead the next era of commercial telecom transformation.

The most credible AI-native propositions combine telecom context, engineering automation, open architecture and measurable production outcomes. Buyers should distinguish operational deployments from demonstrations, accelerators and early-stage PoCs.


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This study examines how **AI is reshaping telecom and media value chains,** from engineering and operations to monetization.




Simplified Illustration Source: ISG 2026

**Definition**

These two quadrants evaluate service providers delivering AI-led engineering, software, integration and modernization services to help telecom enterprises design, build and transform cloud-native, software-defined and API-driven architectures across terrestrial and non-terrestrial network, business and IT domains.

Providers modernize legacy environments into modular, composable systems spanning RAN/O-RAN, 5G core, devices, telco cloud, OSS/BSS and satellite/NTN ecosystems, including ground systems, satellite operations software and terrestrial-satellite integration.

Capabilities include software lifecycle engineering, DevSecOps, microservices, open-source frameworks, network integration and validation, enabling interoperability across hybrid, multi-vendor and multi-orbit environments.

GenAI and agentic AI increasingly enable automated development, intelligent testing, network-function engineering and operations. Providers are assessed on AI-native architectures, orchestration layers, domain models, agent frameworks and integrated data systems, alongside 5G/NTN interoperability, Open Gateway/CAMARA ecosystems, cybersecurity, sovereign communications and resilient service continuity. Services are delivered through engineering- and R&D-led models, managed services and technology ecosystems.


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**Scope of the Report**

This ISG Provider Lens® quadrant report covers the following two quadrants for services: AI Led Telco Engineering and Software Services and Satellite and Non-Terrestrial Network (NTN) Services.

This ISG Provider Lens® study offers IT-decision makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- Focus on the Global market

Our study serves as the basis for important decision-making by covering providers' positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

**Provider Classifications**

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens® quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens® quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).


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## Provider Classifications: Quadrant Key

**Product Challengers** offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

**Leaders** have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

**Contenders** offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

**Market Challengers** have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

**Not in** means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.


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# AI Led Telco Engineering and Software Services

**Who Should Read This Section**

This report is valuable for service providers offering AI-led telco engineering and software services globally to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

**Chief technology officers and network technology leaders**

Can assess providers' capabilities across AI-led telco engineering, network modernization, cloud-native engineering, automation and software development. The analysis highlights provider strengths and market positioning to help them identify partners aligned with technology roadmaps, prioritize modernization and engineering investments and improve network agility, scalability and operational efficiency.

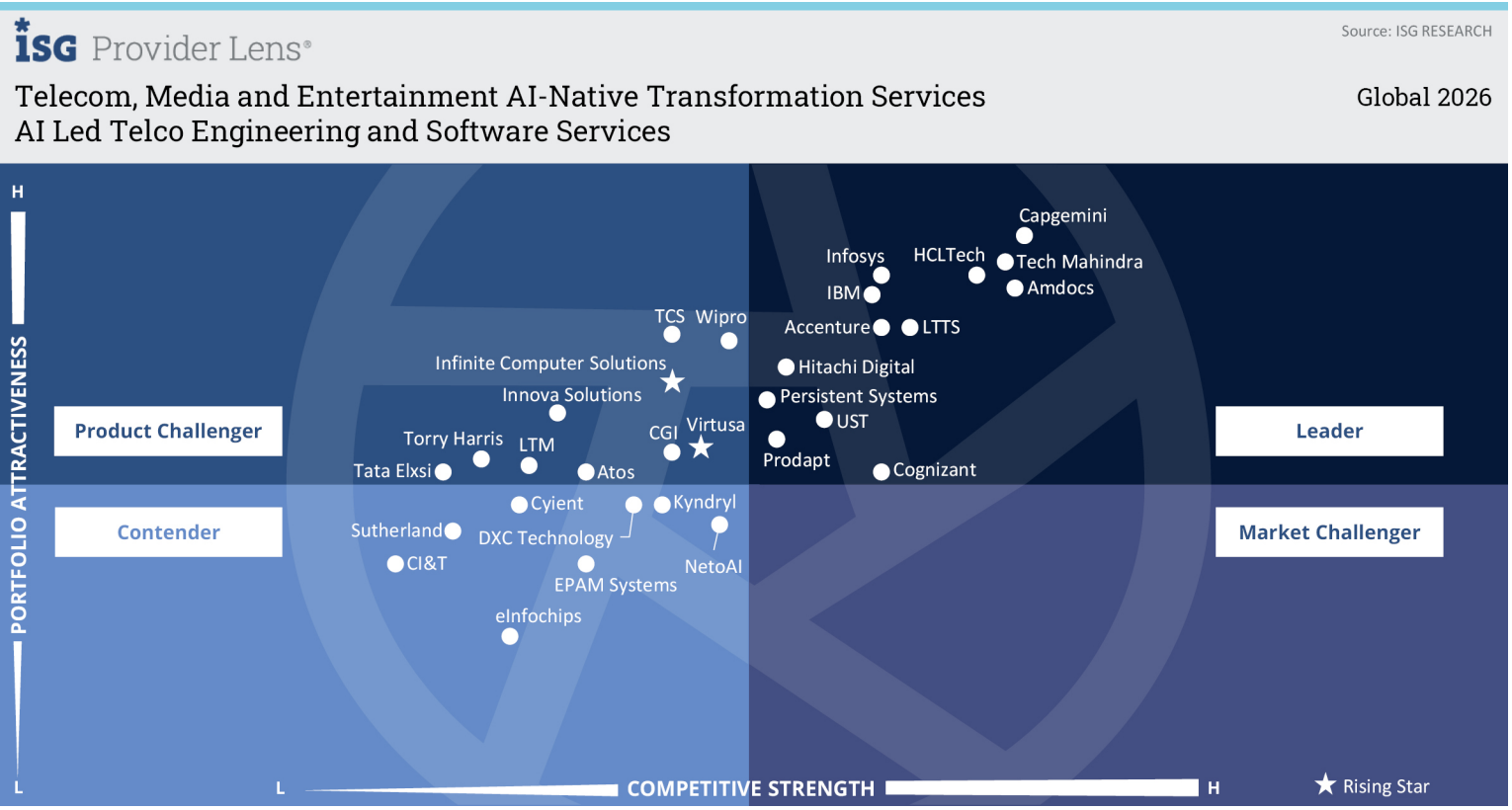
**Heads of Network engineering and operations**

Should read this report to assess providers' capabilities in network modernization, automation, cloud-native engineering and AI-led operations. The analysis helps them compare provider strengths and identify suitable partners to support engineering transformation, operational automation and network evolution while improving performance, scalability and operational efficiency.

**Product engineering and AI leaders**

Should read this report to identify providers with strengths in AI-enabled software engineering, cloud-native development, GenAI integration and intelligent automation. Insights into provider positioning and emerging capabilities support partner selection, product modernization and AI adoption decisions, helping accelerate development cycles, improve engineering productivity and enable innovative telco products and services.


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This quadrant assesses providers delivering **AI-led telco engineering** and software modernization across **network, OSS/BSS and cloud-native platforms.** It evaluates their ability to accelerate **automation, innovation and time-to-market.**

*Yash Jethani*


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**Definition**

This quadrant evaluates service providers delivering AI-led engineering and software services to help telecom enterprises design, build and modernize cloud-native, software-defined and API-driven architectures across network, business and IT domains.

Providers transform legacy environments into modular, composable systems spanning RAN/O-RAN, 5G core, devices, telco cloud and OSS/BSS platforms. Their capabilities include software lifecycle engineering, DevSecOps, microservices and open-source frameworks, enabling faster innovation and interoperability.

Integrating GenAI and agentic AI into engineering workflows and enabling automated development, intelligent testing and AI-assisted network function design is crucial. Providers must move beyond model access to deliver AI-native architectures, including orchestration layers, domain models, agent frameworks and integrated data systems, while supporting autonomous networks and API ecosystems (such as Open Gateway and CAMARA) for real-time orchestration and monetization. These services are delivered through engineering- and R&D-led models and partner ecosystems.

Eligibility Criteria

1. Offer **telecom engineering capabilities** across (AI)-RAN, core, OSS/BSS, devices and cloud
2. Show expertise in **next-gen architectures,** including O-RAN, 5G core, telco cloud, network APIs and digital twins
3. Deliver **cloud-native, API-first and orchestration-first engineering** using microservices, containers and CI/CD
4. Integrate **GenAI** and **agentic AI** into development, testing, optimization and AI-assisted infrastructure validation
5. Support large-scale, global engineering programs using GCC-led delivery models
6. Provide **OSS/BSS engineering** and modernization, including cloud-native architectures, API-driven orchestration, provisioning and charging
7. Align with **open standards** and **ecosystems** (TM Forum, CAMARA, 3GPP and O-RAN) to design AI-native architectures, including orchestration layers, agent frameworks and multi-modal pipelines
8. Integrate **data platforms, vector databases** and **enterprise data** into real-time transactional AI workflows
9. Demonstrate deployments with improved agility and **time-to-market** through AI/agentic engineering practices
10. **Highlight business outcomes,** such as faster service rollout, reduced development cycles and improved interoperability

*Excludes providers primarily focused on product- or platform-led offerings (hardware, software, SaaS)


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**Observations**

Leader capabilities are converging around AI-native telecom engineering, combining cloud-native architectures, agentic SDLC, OSS/BSS modernization and autonomous network foundations. Most providers now embed AI across development, testing, deployment and operations while applying with the TM Forum Open APIs and O-RAN principles. The strongest players integrate network, software, cloud and data domains into unified modernization programs rather than isolated transformation initiatives. Achieving scale through telecom talent, reusable IP, engineering labs, and global delivery remains a key differentiator.

Telecom specialists, such as Amdocs and Prodapt, stand out through telco-native context, OSS/BSS depth and domain-trained agents. Scaled transformation providers, including Accenture, Capgemini, HCLTech, Infosys and Tech Mahindra, differentiate through ecosystem reach, brownfield modernization and delivery scale. Product-engineering specialists such as Hitachi Digital (GlobalLogic), LTTS, Persistent Systems and UST compete through chip-to-cloud engineering, RAN/O-RAN expertise, embedded software and AI-led product development. Platform orchestrators such as IBM focus on cloud foundations, governance and intent-driven automation. Leaders are increasingly combining telecom-specific expertise with AI-native engineering.

AI-RAN, autonomous networks, CAMARA and Open Gateway and agentic engineering appear prominently in provider narratives, but production-scale deployments and quantified outcomes remain uneven. Buyers should validate measurable benefits across SDLC and operations, and assess depth across RAN, 5G core, OSS/BSS and devices. As portfolios expand through acquisitions, ecosystems and proprietary platforms, factors including governance, interoperability, portability and accountability become critical in long-term success.

From the 80 companies assessed for this study, 31 qualified for this quadrant, with 13 being Leaders and two Rising Stars.

accenture

**Accenture** delivers AI-led telecom engineering and software modernization across network, OSS/BSS, cloud and IT domains, combining agentic SDLC, cloud-native architecture, open APIs, network intelligence and ecosystem-led engineering at a global scale.

Amdocs

**Amdocs** is well known for its agentic OSS/BSS engineering, brownfield integration, telco context and governance capabilities. Its brownfield-friendly aOS architecture is differentiated; aOS is explicitly an operating system construct spanning Amdocs products and services.

Capgemini

**Capgemini** supports engineering across telecom software, networks, OSS/BSS, cloud platforms and product development, serving CSPs, NEPs, device vendors and satellite providers through a unified engineering model.

cognizant

**Cognizant's** combination of brownfield modernization, agentic software development, intelligent assurance and telco-cloud engineering supports its positioning at the entry point of the Leader quadrant.

HCLTech

**HCLTech** combines deep network and software engineering with acquired telecom IP, AI Force and multi-vendor labs across O-RAN, 5G core, telco cloud, OSS/BSS and network APIs to modernize heterogeneous CSP estates.

Hitachi Digital

**Hitachi Digital** combines GlobalLogic's chip-to-cloud telecom engineering with its reliability and integration services across RAN and O-RAN, 5G core, OSS/BSS, telco cloud and AI-assisted software delivery.


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**IBM** combines Red Hat cloud-native engineering, watsonx AI and hybrid cloud automation to modernize telco core network, RAN, OSS/BSS and network platforms through open, intent-driven architectures.

**Infosys** combines telecom engineering, Topaz-based agentic SDLC, open standards and cloud-native OSS/BSS modernization to engineer composable, AI-native telecom platforms.

**LTTS** delivers chip-to-cloud telecom ER&D spanning 5G and O-RAN, network software, cloud-native modernization and AI-led testing, backed by engineering labs and product development expertise.

**Persistent Systems** delivers software-first telecom engineering across 5G and RAN, OSS/BSS, cloud and APIs, combining cloud-native product engineering with AI-assisted SDLC and agentic network intelligence.

**Prodapt** provides telecom-native engineering across OSS/BSS, fiber, cloud and autonomous operations, combining Synapt, agentic AI and domain-led engineering for brownfield modernization.

**Tech Mahindra** delivers AI-led telecom engineering across RAN, core, telco cloud and OSS/BSS, combining netOps.ai®, TechM Orion®, open architectures and global network engineering scale.

**UST** is a global digital engineering provider delivering 5G and RAN engineering, RF optimization, network modernization and cloud-native telecom software, supported by proprietary automation, AI and ML capabilities that improve deployment speed, engineering productivity and network performance.

**Infinite Computer Solutions (Rising Star)** provides global AI-led telecom engineering across RAN, 5G core, IMS, OSS/BSS, devices and telco cloud, combining embedded product expertise with agentic SDLC, DevSecOps, automated validation and orchestration assets for carrier-grade modernization.

**Virtusa (Rising Star)** combines OSS/BSS modernization, inventory, service orchestration and telco cloud engineering with AI-assisted SDLC, data fabrics and TM Forum-aligned architectures to modernize complex telecom software estates.


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Leader

"Hitachi Digital stands out through GlobalLogic's product engineering depth across AI-RAN, O-RAN, devices and cloud-native telecom software, strengthened by Hitachi's reliability engineering."

*Yash Jethani*

# Hitachi Digital

**Overview**

Hitachi Digital, a wholly owned subsidiary of Hitachi, Ltd., is a global digital services company that helps organizations in complex, mission-critical industries turn cloud, data and AI into measurable business outcomes. Formed by uniting GlobalLogic and Hitachi Digital Services, the company brings digital engineering and operations together, from enterprise AI to Physical AI, with approximately 38,000 professionals in 27 countries. Hitachi Digital engineers what the world depends on. Visit us at www.hitachidigital.com.

**Strengths**

**Chip-to-cloud engineering breadth:** GlobalLogic spans silicon, embedded software, LTE and 5G stacks, cloud RAN/O-RAN, packet core, OSS/BSS and cloud-native platforms. Its capabilities extend from network functions and device engineering through OSS/BSS modernization, enabling end-to-end telecom engineering beyond application layer transformation.

**Proven AI-RAN and agentic engineering:** GlobalLogic combines AI-RAN innovation, GPU-accelerated radio processing, rApp and xApp development, and agentic orchestration. VelocityAI applies automation across requirements, testing and validation, with reported reductions in manual validation efforts and measurable productivity improvements.

**OSS/BSS modernization and network API monetization:** The provider combines expertise in TM Forum ODA and Open APIs with capabilities across charging, inventory and orchestration, complemented by CAMARA and network API development. AI-assisted BSS modernization and engineering support demonstrate these capabilities.

**Strong product ownership:** GlobalLogic cites long-term ownership of SON, Cloud RAN, analytics and network software platforms, spanning architecture, development, testing and deployment. The 2026 GlobalLogic-HD integration, along with Hitachi's HARC reliability engineering capabilities, supports a move from digital engineering into operational reliability.

**Caution**

While GlobalLogic demonstrates AI-RAN, agentic orchestration and automation, its production scale, operational maturity and measurable outcomes are improving. Although the GlobalLogic-Hitachi operating model strengthens the build-modernize-operate proposition, it should market governance, tooling integration and accountability.


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# Appendix

The ISG Provider Lens® 2026 – Telecom, Media and Entertainment AI-Native Transformation Services study analyzes the relevant software vendors/service providers in the Global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens® program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of September 2026 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

All revenue references are in U.S. dollars ($US) unless noted otherwise.

The study was conducted in the following steps:

1. Definition of Telecom, Media and Entertainment AI-Native Transformation Services market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG's internal databases and advisor knowledge & experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts & figures received from providers and other sources.
6. Use of the following key evaluation criteria:
   * Strategy and vision
   * Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * Technology advancements


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*Lead Analyst*



## Yash Jethani

**Senior Manager and Principal Analyst**

Yash Jethani's professional experience is centered on telecommunications, media and technology (TMT), spanning thought leadership, market and competitive research, consulting, business development, due diligence and account management across corporate marketing, risk, strategy and sales functions. Prior to his current role, he has built a strong foundation across consulting, research, and marketing — advising on technology strategy and thought leadership at a Big Four firm, delivering custom and syndicated research for telecommunications and IoT clients across Asia-Pacific at a leading global analyst firm, and supporting corporate and account marketing initiatives focused on next-generation IT delivery in the telecommunications vertical at several IT providers.

He currently serves as a lead analyst for ISG's Provider Lens® global research studies across enterprise networking, telecom & media, software defined networks, and cybersecurity.

Yash holds a PGDM in Telecom & IT supported by an engineering degree in computers. He is TM Forum certified and is a keen observer of business and macroeconomic trends.

*Research Analyst*



## Mamatha R

**Research Specialist**

Mamatha is a Research Specialist at ISG and supports ISG Provider Lens® studies on e-mobility, power and utility, and banking industry services. She supports the Lead Analysts in the research process on multiple regions and authors the global summary report, and focal points. She also collaborates with the Lead Analysts in rating the providers and building insights around the market trends and drivers.

Before this role, Mamatha was an accomplished professional with over 9 years of experience in data collation, secondary research, and analysis. In her previous role, she conducted in-depth research on workforce dynamics, analyzed market trends, and collaborated with cross-functional teams to develop tools for data assessments. Specializing in the CPG/FMCG industry with Nielsen, Mamtha provided valuable insights and recommendations, led analyses on market entry, product launches, and competition, and leveraged consumer data to identify markets and buying behaviors.


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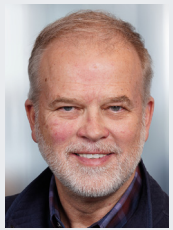


Iain Fisher
**Director, Research**

Iain Fisher is ISG's head of industry research and market trends. With over 20 years in consulting and strategic advisory, Iain now focuses on cross industry research with an eye on technology led digital innovation, creating new strategies, products, services, and experiences by analyzing end-to-end operations and measuring efficiencies focused on redefining customer experiences. Fisher is published, known in the market and advises on how to achieve strategic advantage. A thought leader on Future of Work, Customer Experience, ESG, Aviation and cross industry solutioning. He provides major market insights leading to changes to business models and operating models to drive out new ways of working.

Fisher works with enterprise organizations and technology providers to champion the change in customer focused delivery of services and solutions in challenging situations. Fisher is also a regular Keynote speaker and online presenter, having authored several eBooks on these subjects.

*IPL Product Owner*



Jan Erik Aase
**Partner and Global Head – ISG Provider Lens®**

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a partner and global head of ISG Provider Lens®, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.


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## ISG Provider Lens®

The ISG Provider Lens® Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners. ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens® research, please visit this webpage.

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## ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

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# REPORT: TELECOM TRANSFORMATION AND ENGINEERING SERVICES

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