ISG Provider Lens®

Telecom, Media and Entertainment AI-Native Transformation Services – Monetization and Platform Transformation Services



AI-driven platform and monetization transformation connecting commerce, advertising, customer intelligence and revenue growth

Customized report courtesy of:

Hitachi Digital

QUADRANT REPORT | OCTOBER 2026 | GLOBAL

Table of Contents

Executive Summary 03

Provider Positioning 08

Introduction

Definition 13
Scope of Report 14
Provider Classifications 14

Appendix

Methodology & Team 30
Author & Editor Biographies 31
About Our Company & Research 33

Media Cloud and Platform Engineering Services 16 - 22

Who Should Read This Section 17
Quadrant 18
Definition & Eligibility Criteria 19
Observations 20
Provider Profiles 22

AI-driven Monetization, AdTech and Revenue Operations 23 - 28

Who Should Read This Section 24
Quadrant 25
Definition & Eligibility Criteria 26
Observations 27

© 2026 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Executive Summary

Report Author: Yash Jethani

AI-native platforms are bringing media engineering, operations and monetization together

According to the ISG Provider Lens® Telecom, Media and Entertainment AI-Native Transformation Services — Monetization and Platform Transformation Services study, media and entertainment enterprises are entering a new phase of platform transformation. Cloud engineering, content operations, audience intelligence and monetization can no longer be managed in isolation. Streaming growth, device fragmentation, complex supply chains and economic pressures are propelling companies to unify these domains through shared data, automation and AI-driven operating models.

The market is consequently shifting from isolated cloud migrations and point solution adtech projects toward integrated transformation programs. These programs modernize media platforms while connecting content, audience, advertising, subscription, billing and revenue management workflows. AI is becoming an important orchestration and decision support layer across this environment, supporting metadata enrichment, platform monitoring, campaign optimization, audience activation, dynamic pricing, revenue assurance and operational automation. The convergence of engineering, operations and monetization reflects a market increasingly shaped by platform fragmentation, changing audience behavior and pressure on revenue economics.

This study evaluates service providers across two closely related markets: Media Cloud and Platform Engineering Services and AI-driven Monetization, AdTech and Revenue Operations. The first examines providers modernizing OTT backends, media asset management (MAM)/ digital asset management (DAM) environments, streaming infrastructure, content platforms, gaming backends and multi-screen ecosystems. The second assesses providers transforming advertising, subscriptions and revenue operations through adtech integration, data engineering, AI and managed services.

Media platforms are evolving from **delivery systems** into **intelligent revenue engines.**

© 2026 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Market context

Platform fragmentation is driving convergence

Global media enterprises operate increasingly complex technology estates spanning legacy broadcast systems, cloud platforms, OTT services, FAST channels, advertising platforms, subscription systems and connected device ecosystems. Many organizations have migrated portions of their workloads to the cloud, but their operating models and data foundations frequently remain fragmented. Content, rights, audience, advertising and financial information continue to reside on separate platforms, limiting real-time decision-making and slowing product and revenue innovation.

At the same time, commercial pressure is increasing. Streaming businesses must manage infrastructure and delivery costs while supporting high-quality experiences across smart TVs, mobile applications, set-top boxes, gaming consoles and connected environments. Broadcasters and publishers must monetize content across linear and digital channels, while advertisers expect improved targeting, measurement and attribution. Subscription businesses face pressure to strengthen acquisition, engagement, retention and customer lifetime value.

These conditions are changing the role of service providers. Enterprises increasingly expect providers to combine media domain engineering, cloud architecture, data platforms, AI, adtech integration and managed operations. The objective is not simply to replace legacy systems but to create modular platforms that can evolve without disrupting existing content delivery or revenue-generating operations.

Cloud-native architectures based on APIs, microservices, containers, observability and DevOps are becoming the foundation of transformation. AI extends this foundation through metadata intelligence, automated quality engineering, predictive monitoring, audience decisioning and agent-assisted operations. However, market maturity varies significantly, particularly for autonomous workflows, media-specific FinOps and production-scale agentic AI. As commercial and technological pressures intensify, enterprise attention is shifting from isolated modernization initiatives toward a focused set of platform, data and monetization priorities.

Enterprise priorities

Modernize without interrupting operations

Media enterprises are prioritizing composable, cloud-native platforms that support continuous modernization without disrupting content delivery or revenue operations. Investments are increasingly focused on connecting content, rights, audience, advertising, subscription and financial data through interoperable architectures. Enterprises are seeking stronger multicloud governance, media-specific FinOps, platform observability and automated quality engineering across fragmented device ecosystems. AI adoption is expanding across metadata enrichment, personalization, campaign optimization, churn management and revenue assurance; however, enterprises continue to demand robust governance, explainability and human oversight. As a result, provider selection depends on demonstrated production capabilities, compatibility with existing technology estates and the ability to link transformation programs with measurable operational and commercial outcomes.

Key investment priorities include:

- **Composable media platforms:** Enterprises are modernizing OTT, MAM/DAM, CMS, video processing and streaming environments through modular architectures that allow individual components to be upgraded without replacing the entire technology estate.
- **Multicloud and platform economics:** Enterprises require workload portability, observability, cost governance and FinOps capabilities that connect infrastructure consumption with content volume, audience demand and streaming performance.
- **Device and experience consistency:** Fragmentation across smart TVs, mobile devices, set-top boxes, gaming platforms and connected environments makes device engineering, certification and automated quality assurance strategically important.

© 2026 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

- **Integrated content operations:** Media companies are applying automation and AI across ingestion, processing, metadata, rights, localization, packaging, distribution and content discovery to improve speed and reduce manual handoffs.
- **Unified monetization ecosystems:** Enterprises want advertising, audience, subscription, commerce, billing and content data connected through interoperable architectures rather than separate operational silos.
- **Privacy-first audience intelligence:** First-party data strategies, identity resolution, clean rooms and contextual intelligence are becoming essential as organizations adapt their targeting and measurement approaches.
- **Controlled AI adoption:** Enterprises are interested in AI agents for planning, optimization, monitoring and reconciliation but require governance, human approval, explainability and clearly defined accountability for revenue-critical decisions.

Enterprises should also evaluate the difference between provider-owned IP, partner technology and early-stage roadmap functionality. Provider claims around autonomous operations, dynamic yield optimization and agentic monetization should be tested against production references and attributable business outcomes.

Provider dynamics

Five models are emerging in media platform engineering

Competition in Media Cloud and Platform Engineering Services is increasingly defined by how providers combine engineering depth, transformation breadth and operational scale.

- *End-to-end transformation leaders,* including Accenture, Capgemini and Cognizant, address large programs spanning cloud, content platforms, streaming, data, audience experience and managed operations. Their strength lies in combining consulting, architecture, integration and operational transformation. They are particularly relevant when modernization must extend beyond technology to operating model and organizational change.
- *Media-native engineering and streaming specialists,* including EPAM Systems, HCLTech and LTM, emphasize product engineering, OTT platforms, MAM/DAM, content workflows, streaming infrastructure and device ecosystems. These providers are attractive when technical differentiation, platform performance and media-specific engineering are more important than broad enterprise transformation.
- *Industrialized cloud and media engineering leaders,* including TCS, Wipro and Tech Mahindra, combine global engineering capacity with cloud modernization, automation and managed platform operations. They are well suited to enterprises seeking long-term build-and-operate accountability across large, distributed media estates.
- *Product and platform engineering challengers,* represented by Virtusa and Hitachi Digital with GlobalLogic, offer credible modernization, product development and reliability engineering. Their breadth and market evidence are narrower than those of the largest providers, but they can be compelling for focused platform and workflow transformation requirements.
- *Tata Elxsi and Globant are rising challengers.* Tata Elxsi differentiates through device-to-platform engineering, video software, connected ecosystems and quality assurance. Globant brings a product builder approach combining streaming architecture, experience design and emerging AI-enabled operations.

© 2026 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Monetization providers are separating by strategy, engineering and operational scale

In AI-driven Monetization, AdTech and Revenue Operations, competitive differentiation is moving beyond conventional campaign services. Providers are increasingly expected to connect audience intelligence, inventory, advertising platforms, subscriptions, content systems, billing and financial reconciliation.

- *Strategic media and business transformers,* including Accenture, Publicis Sapient and Capgemini, focus on business model reinvention, cross-media monetization, first-party identity, retail and commerce media, and operating model transformation. Enterprises select these providers when the challenge requires a combination of commercial strategy, customer data, platform engineering and organizational change.
- *Bespoke adtech engineering providers,* most notably EPAM Systems, approach monetization as a product engineering challenge. This model appeals to organizations that want proprietary planning, decisioning, targeting or revenue capabilities and prefer client-owned architectures over additional packaged software dependencies.
- *Industrial operations and billing leaders,* including TCS, Cognizant, Wipro, HCLTech, LTM and Amdocs, emphasize large-scale campaign operations, subscription workflows, revenue assurance, charging, billing and reconciliation. Their value is strongest in complex environments where revenue transformation must coexist with established systems and high-volume operations.
- *Performance catalysts and AdOps factories,* including Jellyfish, TP and Genpact, focus on rapid campaign activation, performance optimization, advertiser operations, customer lifecycle execution and human-plus-AI delivery. These providers are relevant when enterprises require immediate operational capacity and measurable improvements within specific revenue processes.
- Specialist models are also becoming more significant. FAST and connected TV monetization capabilities, including server-side advertising and marketplace operations, offer targeted value where streaming inventory and channel economics are the primary focus.

As these provider models evolve, future leadership will depend on the ability to translate engineering and AI capabilities into governed, production-scale and measurable commercial outcomes.

Outlook

Orchestration, evidence and accountability will shape the market

The next stage of market development will center on intelligent control layers that connect content, platforms, audiences and revenue operations. Rather than operating as isolated applications, rights, metadata, identity, pricing, advertising, distribution and observability systems will increasingly exchange information through APIs, events and governed AI workflows.

AI agents are likely to assume a larger role in repeatable operational activities such as metadata enrichment, campaign preparation, anomaly detection, pacing, reconciliation and exception management. Human oversight will remain essential for editorial, commercial and regulatory decisions, particularly when automated actions can affect revenue, CX or brand safety.

Provider differentiation will therefore depend less on the volume of announced AI assets and more on the ability to demonstrate production deployment, governance and measurable outcomes. Enterprises should favor providers that can integrate with existing technology estates, preserve operational continuity and establish transparent accountability across the client, service provider and platform ecosystem.

© 2026 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Executive Summary

The strongest providers will connect three capabilities: media-specific engineering depth, scalable operational execution and monetization intelligence. Those that can demonstrate this combination through attributable commercial outcomes will be best positioned to lead the global media and entertainment platform transformation market.

Enterprises should prioritize providers that can connect platform modernization with measurable operational and commercial outcomes while clearly separating deployed AI capabilities from prototypes and roadmap propositions.

© 2026 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Scope of the report

This ISG Provider Lens® quadrant report covers the following two quadrants for services/solutions: Media Cloud and Platform Engineering Services and AI-driven Monetization, AdTech and Revenue Operations.

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

- Transparency on the strengths and weaknesses of relevant providers/software vendors
- A differentiated positioning of providers by segments (quadrants)
- 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).

© 2026 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

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.

© 2026 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.



Media Cloud and Platform Engineering Services

Who Should Read This Section

This report is valuable for service providers offering media cloud and platform engineering 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

Should read this report to gain a strategic understanding of how providers are advancing media cloud and platform engineering capabilities. The report covers technology approaches, innovation and market positioning, helping them shape modernization strategies, evaluate strategic partners and prioritize investments that strengthen agility, scalability and long-term technology resilience.

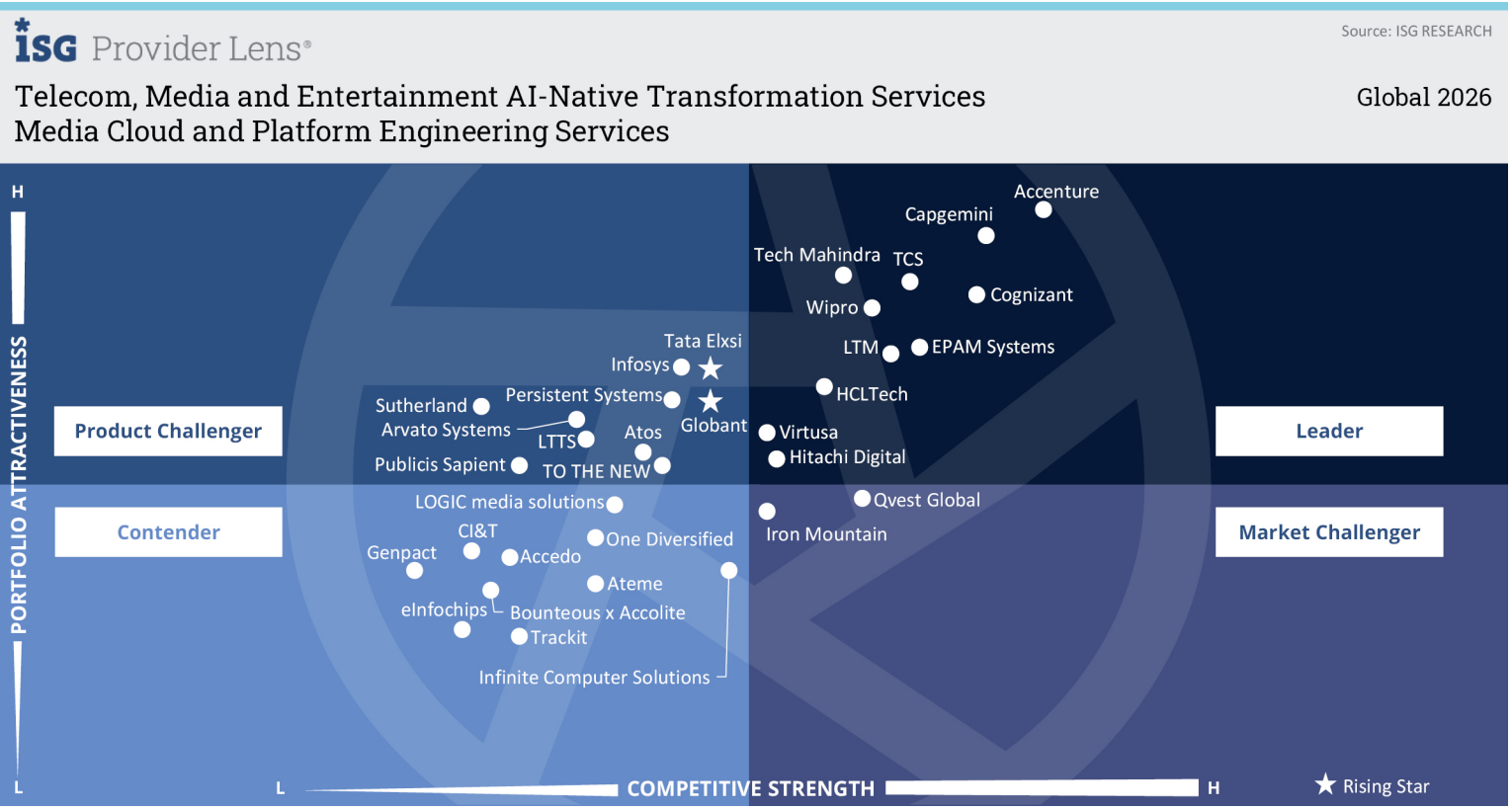
Enterprise architects

Should read this report to gain insights into providers' approaches to cloud architecture, platform integration and modernization. The report provides a view of architectural capabilities and technology choices, supporting decisions on target architecture, interoperability and hybrid or multi-cloud environments while aligning platforms with evolving media technology requirements.

Heads of platform engineering

Should read this report to benchmark providers' capabilities in building and operating scalable media platforms. The report highlights engineering expertise across cloud-native development, platform automation, DevOps and infrastructure modernization, helping them identify suitable partners and strengthen platform reliability, performance and delivery efficiency.

© 2026 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.



This quadrant assesses providers delivering **media platform engineering, cloud-native modernization** and **operations** across OTT, broadcast and digital media ecosystems, covering **cloud-native media platforms, streaming and end-to-end content operations.**

Yash Jethani

© 2026 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Definition

This quadrant evaluates service providers delivering cloud, platform engineering and integration services for M&E enterprises, including broadcasters, studios, streamers, sports organizations and publishers. Providers modernize OTT backends, MAM/DAM environments, game backend or LiveOps/data platforms and streaming infrastructure, while supporting content aggregation, multi-platform distribution and anti-piracy.

The quadrant focuses on cloud-native media operations: platform modernization, multi-cloud architecture, content processing, transcoding, live streaming, CDN optimization, DRM, device certification, observability, DevOps and FinOps. Hyperscalers and platform providers shape the technology ecosystem. This quadrant evaluates IT service providers that integrate, customize, operate and modernize cloud, AI, FAST, DAI/SSAI, and multi-CDN environments.

Providers are assessed on delivering scalable, secure, resilient media platforms that optimize performance, costs and global speed-to-market.

*Excludes hyperscalers, media platform vendors, SaaS providers and video infrastructure OEMs.

Eligibility Criteria

1. Deliver **media cloud and platform engineering** across OTT, streaming, broadcast, publishing and digital media environments
2. Modernize **MAM/DAM, CMS, video platforms, streaming backends, data platforms** and **media workflows**
3. Engineer and **integrate cloud-native architectures** using microservices, APIs, containers, DevOps and observability
4. Support **video processing and delivery,** including ingest, transcoding, packaging, DRM, CDN optimization and live/linear streaming
5. Enable device ecosystems across smart TVs, mobile apps, set-top boxes, gaming consoles and connected devices
6. Integrate **hyperscaler and media technology ecosystems,** including AWS, Google Cloud, Azure, Harmonic, MediaKind, Amdocs and other relevant platforms
7. Use **AI, automation and analytics for platform operations, quality engineering, metadata enrichment, performance monitoring** and **cost optimization**
8. Deliver secure, resilient and compliant platforms, including **content security, IP protection, privacy and regional compliance**
9. Support **global platform programs,** including cloud migration, modernization, managed engineering and GCC-led delivery with reference cases
10. Demonstrate **outcomes** such as faster launch, improved reliability, lower media ops cost, broader device coverage and better streaming quality

© 2026 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Observations

Providers increasingly augment platform engineering with AI-driven workflow automation, metadata enrichment, quality of experience (QoE) monitoring, platform operations and content monetization. Common strengths include hyperscaler partnerships, reusable accelerators, multicloud capabilities, device engineering and the ability to support long-term platform modernization while maintaining operational continuity.

Accenture, TCS, Cognizant and Wipro differentiate through scale, consulting-led transformation, managed operations and enterprise-wide modernization programs. The Silicon-to-Screen Engineers (HCLTech, Capgemini and Tata Elxsi) stand out through device, firmware, Reference Design Kit (RDK), broadband and video delivery engineering, making them particularly relevant for fragmented endpoint ecosystems and connected media environments. The Innovators (EPAM, Hitachi Digital, GlobalLogic and Globant) emphasize bespoke platform engineering, high-concurrency architectures, product development and experience-led modernization. Meanwhile, LTM, Virtusa and Tech Mahindra differentiate through workflow automation, platform operations, content monetization, media data engineering and operational optimization across complex media estates.

Across the market, enterprises should distinguish production-proven capabilities from emerging AI and agentic automation claims. Evidence of media-specific FinOps, orchestration across multiple content delivery networks (CDNs), large-scale live-streaming performance and autonomous operations varies across providers. Many firms would benefit from publishing more quantified production references, clearer ecosystem accountability and stronger links between platform accelerators, AI assets and measurable business outcomes.

From the 80 companies assessed for this study, 33 qualified for this quadrant, with 11 being Leaders and two Rising Stars.

accenture

Accenture is a global consulting-led services provider delivering media cloud, platform engineering and managed operations across video platforms, content supply chains, audience experiences, advertising and monetization environments.

Capgemini

Capgemini is a global consulting, technology and engineering services provider delivering media cloud, platform and data engineering, as well as managed services, across content, distribution, monetization and audience experience environments.

cognizant

Cognizant delivers media platform engineering, cloud modernization and managed services across OTT platforms, content supply chains, video distribution and multi-screen consumer experiences.

<epam>

EPAM Systems is an engineering-led services provider that designs, modernizes and operates cloud-native platforms across streaming, media supply chains and multi-screen video, data and gaming environments.

HCLTech

HCLTech is an engineering-led technology services provider that modernizes cloud-native video platforms, media workflows, streaming infrastructure, device ecosystems and multicloud operations for broadcasters and converged operators.

© 2026 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Hitachi Digital

Hitachi Digital and **GlobalLogic** combine digital product engineering, cloud-native media development and reliability-led operations across streaming platforms, video processing, broadcast systems and connected device ecosystems.

LTM

LTM is a global technology services provider delivering cloud-native engineering, platform modernization and managed operations across OTT, streaming, publishing, gaming and digital content environments.

TCS helps media organizations modernize OTT platforms, content workflows and video delivery environments through cloud-native engineering, platform transformation and managed operations.

Tech Mahindra is an engineering-led technology services provider that modernizes and operates cloud video platforms, OTT backends, content systems, distributed streaming infrastructure and multi-screen environments.

virtusa

Virtusa is an engineering-led technology services provider that modernizes media workflows, OTT platforms, content systems, video processing and cloud operations across broadcast, publishing and digital media environments.

Wipro differentiates through its combination of video production platforms, device engineering heritage and engineering-led media modernization. It offers credible platform, gaming and operational capabilities.

Globant

Globant (Rising Star) is a digital product engineering provider that designs cloud-native streaming platforms, media workflows, connected experiences and AI-enabled operations for broadcasters, streamers and sports organizations.

Tata Elxsi

Tata Elxsi (Rising Star) is a design-led product engineering specialist delivering cloud video platforms, content systems modernization, device engineering and quality assurance across OTT, broadcast and connected media environments.

© 2026 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Leader

"GlobalLogic brings the product engineering precision to build modern media platforms, while Hitachi extends the proposition into cloud operations and reliability, bridging product concept and sustained production."

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

Media platform and cloud engineering: GlobalLogic provides cloud-native media engineering across ingest, asset management, processing, distribution, metadata, workflow automation and media data. Its references include SaaS media processing platforms, remote production environments, cloud video processing, digital mastering, localization and large-scale media data modernization across AWS, Azure and Google Cloud.

OTT, device and broadcast modernization: GlobalLogic supports streaming applications, web services, channel platforms, television operating systems and mobile experiences across 13 platforms. Its work on ATSC 3.0 ecosystems, backend services, Android middleware and broadcaster applications supports the transition from traditional broadcast to software-defined, Internet Protocol-based delivery.

Engineering-to-operations continuity: GlobalLogic combines its design, architecture, development, testing and launch services with Hitachi Digital' SRE-led RunOps, observability, FinOps and automated compliance through its Application Reliability Centers. This helps clients maintain continuity between platform modernization and ongoing operations. Together, the companies report more than 40,000 professionals, over 70 innovation labs and delivery capabilities in more than 50 countries.

Caution

Hitachi Digital and GlobalLogic should better link cloud-native engineering, OTT modernization and broadcast-to-Internet Protocol expertise with measurable outcomes. Greater visibility of references and joint engineering-to-RunOps capabilities would further differentiate their offering.

© 2026 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Appendix

Methodology & Team

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.

Study Sponsor:
Iain Fisher

Lead Analyst:
Yash Jethani

Editor:
Shaurya Vineet

Research Analyst:
Mamatha R

Data Analyst:
Shilpashree N

Consultant Advisors:
Geoff Wahl, Susanta Dey, Jon Harrod, Shriram Natarajan, Sam Barringer, David Locke and Leon Platts

Project Manager:
Payal Brij

Information Services Group Inc. is solely responsible for the content of this report. Unless otherwise cited, all content, including illustrations, research, conclusions, assertions and positions contained in this report were developed by, and are the sole property of, Information Services Group Inc.

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 Septembe 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

© 2026 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

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 and Co-Author



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.

© 2026 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.



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.



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.

 © 2026 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

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.

ISG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties and cities) and higher education institutions. Visit: Public Sector.

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

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.

For more information, visit isg-one.com.

© 2026 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

ISG Provider Lens®

OCTOBER, 2026

REPORT: MONETIZATION AND PLATFORM TRANSFORMATION SERVICES

© 2026 Information Services Group, Inc.
All Rights Reserved