ISG Provider Lens®

# Telecom, Media and Entertainment AI-Native Transformation Services – Telecom Autonomous IT and Business Operations Services



Agentic and autonomous operations reshaping telecom IT, network and business processes from insight to action

Customized report courtesy of:

techwave

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# Executive Summary

*Report Author: Yash Jethani*

**Governed autonomy is the new benchmark for scaled telecom operations and profitable growth**

This ISG Provider Lens® study, Telecom Autonomous IT and Business Operations Services, evaluates the competitive landscape for providers serving the global telecom market in 2026. It covers two quadrants:

- Autonomous Telecom IT & Business Operations
- AI-Driven Customer and Revenue Operations.

The study assesses how providers apply AI, automation and domain expertise to modernize telecom operations, customer engagement and revenue processes.

**Market Context**

**From automation to operational autonomy**

Telecom enterprises are moving beyond task-level automation toward operating models in which AI interprets events, determines actions and coordinates execution across network, IT, business and customer environments. This transition reflects the increasing complexity of hybrid telecom estates, where cloud-native platforms coexist with legacy OSS/BSS applications, physical networks, digital channels and fragmented operational data.

Providers connect operations support and business support systems (OSS/BSS) with network operations center (NOC), IT service management (ITSM) and configuration management database (CMDB) environments. Artificial intelligence supports root cause analysis (RCA), reduces mean time to repair (MTTR) and protects service-level agreement (SLA) performance across virtualized Evolved Packet Core (vEPC) and IP Multimedia Subsystem (IMS) estates. This enables communications service providers (CSPs) to improve resilience while controlling operating expenditure (OpEx).

The challenge is not simply to deploy AI. It is to establish an operational framework

**Autonomy** is shifting from isolated automation to **governed, cross-domain execution.**


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capable of maintaining context across service chains. In practice, this requires observability, data governance, workflow orchestration, domain knowledge and policy controls to function as an integrated system. The study, therefore, distinguishes between providers that demonstrate isolated AI use cases and those that can support repeatable, closed-loop operations in production.

Telecom operators continue to navigate a difficult economic trade-off. They must contain the cost of running complex estates while investing in network modernization, digital CX and new monetization models. While conventional labor arbitrage remains relevant, it is no longer sufficient to deliver the required productivity. Providers are consequently being evaluated on their ability to redesign processes, reduce operational effort and connect automation to measurable service, cost and revenue outcomes.

**Governance becomes part of the architecture**

Greater operational autonomy also increases the importance of control. Autonomous decisions affecting service assurance, billing, customer treatment or revenue must be traceable and reversible. This requirement places approval gates, decision logs, role-based controls, model monitoring and rollback mechanisms within the target architecture, rather than treating governance as a separate compliance activity.

The global character of the market adds another layer of complexity. Multinational operators need common AI and automation foundations, but deployments must accommodate differences in data residency, privacy, workforce practices, language and regulatory exposure. Providers must, therefore, balance platform standardization with locally configurable controls. The quadrant results should be read through this lens: technical innovation matters, but sustainable leadership depends on converting it into governed, production-ready operations across heterogeneous telecom environments.

For telecom enterprises, these structural forces translate into a more demanding set of sourcing priorities.

**Enterprise Priorities**

**Production evidence replaces pilot enthusiasm**

Enterprise expectations are shifting from demonstrations of AI potential to evidence that AI can operate reliably within live telecom processes. Enterprises increasingly examine how a proposed solution will progress from assisted decision-making to supervised automation and, where risk permits, closed-loop execution.

Most case references collected as part of this study combine agentic AI, AIOps, knowledge intelligence and automated runbooks to correlate incidents across applications, infrastructure, APIs, databases and network components. The study also routes complex or high-risk incidents to support teams with contextual information rather than attempting unrestricted automation. This illustrates the architectural and governance depth now expected by enterprises.

The most important enterprise priorities are:

- Enterprises want end-to-end service visibility that connects network conditions, application behavior, business processes and customer impact rather than generating additional disconnected alerts.
- Enterprises are prioritizing governed autonomy with approval thresholds, auditability, policy enforcement and tested rollback paths for actions that could affect customers or revenue.
- Operators expect AI investments to reduce operational effort and improve service outcomes, with evidence captured through measures such as resolution time, incident avoidance, service availability, containment and cost-to-serve.
- Enterprises are seeking reusable automation foundations rather than separate AI solutions for each operational tower, although the pace of autonomy must remain sensitive to process risk.


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- Telecom companies increasingly expect providers to combine engineering, managed operations and organizational change, as new technology alone cannot address issues related to fragmented accountability or insufficient operational knowledge.

**Operating-model redesign gains importance**

The shift toward autonomy changes roles as well as systems. Operations teams need to move from repetitive triage and execution toward exception management, preventive engineering and oversight of AI-led workflows. Enterprises are, therefore, evaluating providers' approaches to knowledge capture, workforce reskilling and human-machine accountability alongside the underlying technology.

Global operators also require a pragmatic balance between centralization and flexibility. A common control plane can improve reuse, consistency and governance, but excessive centralization can slow adaptation to local networks, product portfolios and regulatory requirements. The emerging preference is for federated autonomy: shared data, observability and governance foundations paired with domain-specific agents and locally configurable execution policies.

Technology maturity alone is not enough, because the operating model must evolve alongside the automation environment.

Customer and revenue operations have distinct evaluation requirements. Telecom enterprises want customer engagement AI to integrate with CRM, billing, charging, service assurance and monetization systems. Without this integration, virtual agents may reduce interaction effort, but they cannot resolve the underlying order, billing or network issue. Enterprises are, therefore, assessing whether proposed solutions can preserve context from the initial interaction through fulfillment, assurance and revenue processes.

This situation creates a second trade-off between rapid CX improvement and deeper structural transformation. Interaction layer automation can deliver earlier benefits, while end-to-end customer-to-revenue orchestration requires more extensive changes in data, processes and platforms. Mature sourcing strategies prioritize these goals rather than treating them as alternatives.

The practical implication is a higher threshold for what buyers consider enterprise-ready. This threshold applies not only to technical operations but also to customer, commercial and revenue processes. Hence, provider differentiation now depends on how convincingly these requirements are converted into delivery mechanisms.

**Provider Dynamics**

**Autonomous Telecom IT & Business Operations:**

The competitive center of this quadrant is moving toward providers that combine telecom operations scale with production-grade orchestration. Leading capabilities span OSS/BSS and enterprise IT modernization, network and service assurance, AIOps, cloud operations, workflow automation and managed services. However, breadth alone does not establish differentiation. Providers must demonstrate how telemetry is converted into contextual decisions, how actions are authorized and how the system confirms that the intended business or service outcome has been achieved.

Strong provider approaches use staged autonomy. Low-risk, repeatable processes can move toward closed-loop execution, while complex or customer-sensitive events retain human approval. Knowledge graphs, operational history, standardized runbooks and service topology models provide context to agents. Policy engines control allowable actions, and validation steps confirm restoration before an incident is closed. This combination separates credible operating models from generic claims about agentic AI.

TM Forum's Open Digital Architecture (ODA), Shared Information/Data model (SID), enhanced Telecom Operations Map (eTOM) and Autonomous Network Levels (ANL) provide foundations for structured autonomy. Open Network Automation Platform (ONAP), Open Radio Access Network (O-RAN) rApps and CAMARA network application programming interfaces further support modular orchestration and network-capability exposure.


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A European autonomous network example highlights process redesign based on telecom industry practices, a shift from static rules toward AI-driven decisions and the use of intent-based networking and digital twins to support policy-driven network adaptation. It also emphasizes a stepwise maturity model and workforce change, rather than presenting autonomy as an immediate technology cutover.

Two provider models are gaining ground. Full-spectrum providers bring large managed operations estates, engineering depth and industrialized service delivery. Architecture-led providers differentiate through AI control planes, hybrid cloud platforms and orchestration. Telcom-focused specialists compete through domain-specific IP, pre-configured process knowledge and faster implementation. Managed operations providers with extensive installed bases remain relevant but must demonstrate a stronger transition from AIOps and assisted remediation to genuinely closed-loop, agentic execution.

The primary provider gaps are in production evidence and control. Some propositions remain collections of copilots, accelerators and automation tools without a coherent execution architecture. Others demonstrate impressive pilots but provide limited evidence of repeatability across operational domains. Providers also vary in their ability to connect autonomy to commercial accountability. Outcome-based and gain-sharing models are becoming more credible where baseline measures, operational dependencies and attribution rules are clearly defined.

**AI-Driven Telecom Customer and Revenue Operations:**

This quadrant is developing around the convergence of CX, data, CRM, billing and revenue operations. Competitive differentiation depends on whether providers can move beyond interaction automation and orchestrate the complete customer lifecycle from acquisition and onboarding to service, retention and monetization.

Transformation-led providers redesign operating models and integrate customer-facing processes with broader business and financial objectives. Systems integration-oriented providers focus on data pipelines, cloud platforms, model interoperability and the middleware needed to connect AI with legacy environments. Telecom specialists reduce integration effort by bringing domain models, BSS knowledge and established network-to-care integration patterns. Customer operations specialists differentiate through large-scale interaction data, language coverage, operational management and the ability to combine human and digital labor. Process-led providers address revenue leakage, billing disputes, onboarding and credit-to-cash workflows.

The strongest propositions establish a continuous context loop. A customer interaction triggers identity and intent recognition, draws on real-time service and account information, initiates an authorized workflow and updates the relevant CRM, billing or assurance system. The solution then records the outcome so that subsequent interactions and decisions benefit from the same context. This mechanism is more valuable than a virtual agent operating only within the contact center.

Providers must still balance personalization and control. Real-time decisioning can improve relevance and resolution, but uncontrolled access to customer, payment and network data poses privacy, security and explainability risks. Leading architectures separate reasoning from execution, restrict agents to authorized data and actions and maintain records of the information and policies used in each decision.

Evidence should include more than model accuracy or demonstration quality. Enterprises require proof of containment without repeat contacts, successful completion of underlying workflows, billing and order accuracy, revenue assurance improvements and stable escalation from digital to human channels. Providers that measure only reduced handling time risk optimizing the interaction while leaving the customer's actual problem unresolved.

Across both quadrants, the market is stratifying around four durable capability dimensions: telecom depth, production-scale operations, AI and orchestration architecture, and measurable transformation outcomes. Scale-centered providers lead where enterprises require global


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delivery and broad operational coverage. Specialist providers remain competitive where domain precision, integration speed or targeted IP outweigh workforce scale.These shared foundations provide a clear indication of the market's likely direction.

**Outlook**

Over the next 12 to 24 months, the market is likely to move from independent automation programs toward coordinated autonomy across network, IT, customer and revenue processes. Operators will not permit unrestricted self-operation across every domain. Instead, they will define graduated levels of autonomy based on process predictability, financial exposure, customer impact and regulatory risk.

The enterprise-side risk is automation fragmentation. If individual functions procure separate agents, data platforms and orchestration tools, operators may reproduce the silos they intended to remove. Enterprises should establish a shared control architecture, define autonomy levels by process and require providers to demonstrate end-to-end execution across representative service chains. They should also contract for verified outcomes rather than for volumes of deployed use cases.

The provider-side risk is overstating maturity. As agentic terminology becomes widespread, enterprises will place greater weight on live operational evidence, decision traceability and the ability to explain where human intervention remains necessary. Providers should invest in reusable domain knowledge, policy-as-code, agent observability, simulation environments and regression testing for autonomous workflows. They must also demonstrate how their delivery workforce and commercial models evolve as automation assumes greater execution responsibility.

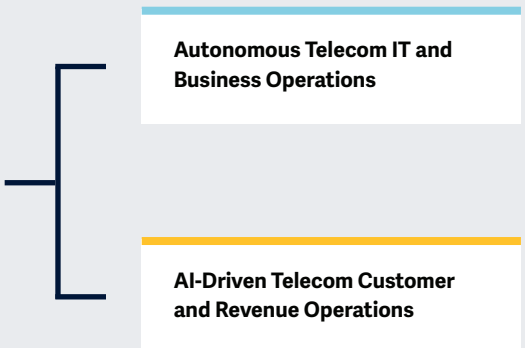
Leadership will increasingly depend on connecting the two quadrants. Network or IT events should guide customer treatment, while customer and revenue signals should influence assurance and operational priorities. Providers that can establish this cross-domain context without compromising security, governance or local regulatory requirements will be best positioned.

For enterprises, the immediate action is to select a limited number of high-value service chains and assess their data readiness, control requirements and operational dependencies. For providers, the priority is to replace broad AI narratives with evidence showing how agents reason, act, escalate, validate and learn within governed telecom environments. The market's next phase will be defined not by the number of agents deployed, but by the amount of accountable operational work they can perform.

The decisive buying criterion is no longer whether a provider has AI assets. It hinges on the provider's ability to demonstrate that these assets make controlled decisions, execute safely across operational boundaries and produce auditable business outcomes. While AI models, connectivity and cloud capacity may commoditize, the economic value increasingly shifts toward orchestration, integration, governance, ecosystem control and service platforms.


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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 providers that embed AI across telecom network, IT, business, customer and revenue operations, enabling real-time, closed-loop execution and transforming traditional operational and customer-facing processes into predictive, self-optimizing and outcome-driven environments.

Providers modernize and manage OSS/BSS, network and IT operations, service assurance and customer lifecycle processes, spanning acquisition, onboarding, care, retention and monetization. Their capabilities include AIOps, service orchestration, closed-loop automation, intelligent workflows, contact center transformation, revenue operations and real-time engagement, enabling increasingly intent-driven and autonomous operations.

GenAI and agentic AI enable incident resolution, network optimization, intelligent customer interactions, automated support, personalization, sales optimization and dynamic revenue management. Providers integrate observability, data, CRM and monetization platforms to coordinate actions across technology and business domains while improving resilience, experience and revenue outcomes. Services are delivered through managed, co-managed, GCC-led and outcome-based models, supported by hyperscalers, platforms and domain accelerators.


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**Scope of the Report**

This ISG Provider Lens® quadrant report covers the following two quadrants for services: Autonomous Telecom IT and Business Operations and AI-Driven Telecom Customer and Revenue Operations.

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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# Sweet Spot

# Techwave

**Overview**

Techwave is a digital engineering and technology services provider with strong capabilities spanning telecom, including fiber and outside-plant engineering, GIS, asset and field operations, cloud, data and enterprise integration. Its emerging Nalora® AI ecosystem adds an intent-governed orchestration layer that connects AI reasoning with deterministic execution across trusted engineering and operational tools.

**Key Provider Capabilities**

- **Fiber and outside-plant engineering:** Techwave supports telecom network planning, field engineering, permitting, asset management and network validation. GIS is central to Techwave's differentiation, bringing operational context. The company combines geospatial, asset and infrastructure data with engineering workflows and leverages Esri, IQGeo and QGIS. This provides a physical network context around routes, sites, assets, field accessibility and service dependencies that generic IT operations platforms may lack.
- **Nalora® AI orchestration:** Techwave positions Nalora as an intent-governed AI operating layer. It interprets unstructured enterprise information and business intent and then passes deterministic instructions to trusted tools rather than allowing an LLM to modify network assets directly. Separating reasoning from execution supports human oversight and traceability in sensitive engineering workflows.
- **Hyper-automation and enterprise integration:** Techwave applies AI-assisted orchestration to wireline and wireless design, sequencing activities across engineering tools, CAD, GIS and system updates. Its cloud, data, SAP and digital engineering capabilities can connect physical network processes with enterprise workflows.
- **Intelligent permit lifecycle management:** Techwave has supported permit planning and governance across projects totaling over 52 million feet of fiber infrastructure, using predictive analytics to identify at-risk permits, regulatory dependencies and approval delays before they affect construction schedules. This can accelerate permit turnaround and improve stakeholder coordination, deployment predictability and operational efficiency across large-scale fiber expansion programs. This also creates an opportunity to extend Nalora®-led orchestration from engineering workflows into permit preparation, validation and infrastructure execution.

**Benefits Delivered**

- Connected more than 1.2 million premises with 111 million feet designed/surveyed for a U.S. fiber provider.
- Identified up to 60 percent optimization potential for site visit resources across an infrastructure footprint exceeding 40,000 poles and 52 million feet for permits.
- Connects GIS, engineering and field context with enterprise workflows through governed AI orchestration.


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# Techwave

**Sweet Spot**

- Techwave's sweet spot is governed automation for fiber, tower and field-intensive telecom environments where AI must understand the physical network context before initiating actions. It is relevant when buyers need to connect GIS, engineering, asset, telemetry and enterprise process data *rather than deploy another horizontal AIOps layer.*
- Techwave combines outside-plant and field-engineering knowledge with GIS-centric data integration and enterprise technology capabilities. This enables the company to connect network planning, permitting, construction, inventory, predictive maintenance and field dispatch with SAP, cloud and enterprise workflows. For regional telcos, fiber operators and tower companies, this specialization can offer a focused alternative to broad Tier-1 transformation programs.
- Nalora® adds an emerging IP layer. Its architecture separates AI reasoning from deterministic execution: AI interprets intent and coordinates workflows; trusted CAD, GIS and automation tools perform controlled actions. This can reduce hallucination risk and preserve human approval, auditability and workflow state if incorrect actions create service, regulatory or safety consequences.
- Techwave differentiates itself through data-driven telecom network planning, permitting and as-built services at scale, supported by deep GIS expertise, engineering workflows and digital delivery capabilities. It could create a telecom infrastructure intelligence layer that connects GIS, engineering rules, field data, telemetry and enterprise workflows. This context can improve planning accuracy, permit lifecycle management, asset decisions and as-built data governance while supporting future automation.
- Organizations should consider Techwave, where geospatial and infrastructure data are central to network transformation. Further productization of Nalora across design-to-permit-to-build workflows could distinguish it from traditional engineering providers and horizontal AI/IT services firms.

**Future roadmap**

- Techwave's roadmap opportunity lies in developing Nalora® into a product for governed fiber and field operations.
- Priorities should include reusable connectors for GIS, OSS, inventory, ITSM, SAP EAM and field service platforms; telecom ontologies for sites, routes, assets, permits and work orders; and deployable agents with approval, rollback and policy controls.
- Expanding predictive maintenance into audited closed-loop workflows would strengthen Techwave's credentials in autonomous operations.
- Techwave should also publish multi-client benchmarks for deployment cycle time, site visits, permit processing, asset accuracy and operational savings, while demonstrating deeper production OSS/BSS integration.


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# 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.

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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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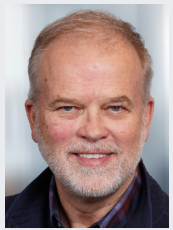


Iain Fisher
**Director, Research**

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

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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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**OCTOBER, 2026**

# REPORT: TELECOM AUTONOMOUS IT AND BUSINESS OPERATIONS SERVICES

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