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Whitepaper

From Orbit to Operator Value

How Telcos Can Monetize
Satellite-Terrestrial
Convergence at Scale





Executive Summary

The satellite communications (SATCOM) market is entering a new era of commercialization, driven by developments in reusable launch economics, software-defined payloads, 3GPP-standardized Non-Terrestrial Networks (NTN), and sovereign investments. With the convergence of satellite and terrestrial networks, telecommunications operators need to establish profitable participation models in the new hybrid ecosystem.

The structural shifts constantly transforming the industry are creating new monetization opportunities, architectural requirements, and a growing role for AI-native operations. Practical frameworks and maturity models help operators assess their position, scale capabilities, and create sustainable value in the SATCOM era.



Content

Executive Summary **pg.2**

Introduction **pg.4**

Why SATCOM Matters Now **pg.5**

Market Shifts and Convergence Drivers **pg.6**

The Regional Landscape: Europe and the UK at the Forefront **pg.7-8**

The Evolving Role of SATCOM in Telecom Value Creation **pg.9-11**

The Connectivity Value Stack **pg.12-13**

Satellite-Driven Monetization Models for Telcos **pg.14-16**

Strategic Choices: Where Telcos Should Play **pg.17-18**

From Network Ownership to Control-Plane Economic **pg.19-20**

An AI-Native Operating Model for Hybrid Connectivity **pg.20**

TechM Hybrid Connectivity Maturity Model **pg.22-23**

Business Architecture Blueprint **pg.24-25**

Risks, Barriers, and Success Factors **pg.26**

A Practical Roadmap for Telcos **pg.26-27**

The 2030-2035 Vision with Autonomous Connectivity Enterprise **pg.28**

Conclusion **pg.29**

About the Authors **pg.30**



Introduction

Once a niche extension for remote coverage, satellite connectivity is fast becoming a strategic platform for delivering resilient, intelligent, and ubiquitous connectivity. This change is made possible by major advances in reusable launch technologies, software-defined payloads, 3GPP-standardized Non-Terrestrial Networks (NTN), and increasing investments linked to national digital sovereignty initiatives.

According to Research and Markets (2026), the satellite telecommunications market was valued at USD 37.3 billion in 2026 and is forecast to reach USD 45.6 billion by 2030.¹ Operators are confronted with a new set of strategic decisions. The question is how to monetize, operationalize, and integrate satellite connectivity into existing business models.



Why SATCOM Matters Now

For almost 30 years, SATCOM has played a valuable role in the telecommunications narrative, providing coverage for maritime routes, remote locations, broadcast distribution, and certain government operations. However, this position is now changing. Four concurrent shifts are currently drawing satellite technology into the core of the connectivity value chain.

Demand has Shifted from Coverage to Outcomes

Organizations and public-sector purchasers have shifted from buying 'coverage' to acquiring outcomes such as uptime, resilience, reach, and continuity. GSMA Intelligence and Viasat's joint report 'The Great Connectivity Convergence: NTN in Consumer Mobile' noted that more than 60% of consumers worldwide are willing to pay a premium for satellite-enabled smartphone services, with 47% ready to switch providers if a competitor offered outdoor satellite coverage in their subscription.²

Economics has Reset

The costs associated with LEO deployment have significantly decreased due to the advent of reusable launch systems and the mass production of small satellites. According to all leading analyst firms, the SATCOM market is expected to approximately double in the coming years.

The Standards Stack has Matured

The 3GPP releases have transitioned the distinction between terrestrial and non-terrestrial radio from a structural basis to a software-based one, with regenerative payloads enabling the entire gNB (5G base station) to be situated on the satellite itself.

Sovereignty and Resilience have Re-priced the Asset

The IRIS² program in Europe, with a revised budget of €15.6 billion and a constellation of at least 348 satellites, clearly positions satellite communications as an integral component of the resilience and sovereignty framework, rather than just a means for rural connectivity.³

The competitive issue has shifted from merely accessing satellite capacity to determining whether operators can transform the emerging demand for hybrid connectivity into scalable, commercially managed services backed by SLAs.

Market Shifts and Convergence Drivers

Three convergence dynamics, each having direct implications for monetization.

Multi-orbit Composability

The discussion has shifted from 'GEO versus LEO' to integrating both. Hybrid GEO-LEO architectures, managed by software-defined ground systems and AI-enhanced traffic management, have become the prevailing design model.

5G NTN and Direct-to-Device (D2D)

Researchers estimate the total D2D opportunity to be USD 93 billion over the next decade.⁴ GSMA Intelligence monitors 91 telco-satellite partnerships worldwide.⁵

Backhaul and Enterprise Integration

LEO's role is expanding beyond rural connectivity into a premium tier that provides resilience, broader coverage for SD-WAN and edge environments, and accelerated monetization for anchor customers in markets ahead of fiber rollout.

What Does This Mean for Operators:

- Value will shift from capacity ownership to policy, assurance, and customer control.
- Operators that fail to converge OSS/BSS and SLA logic will remain stuck in low-margin participation models.



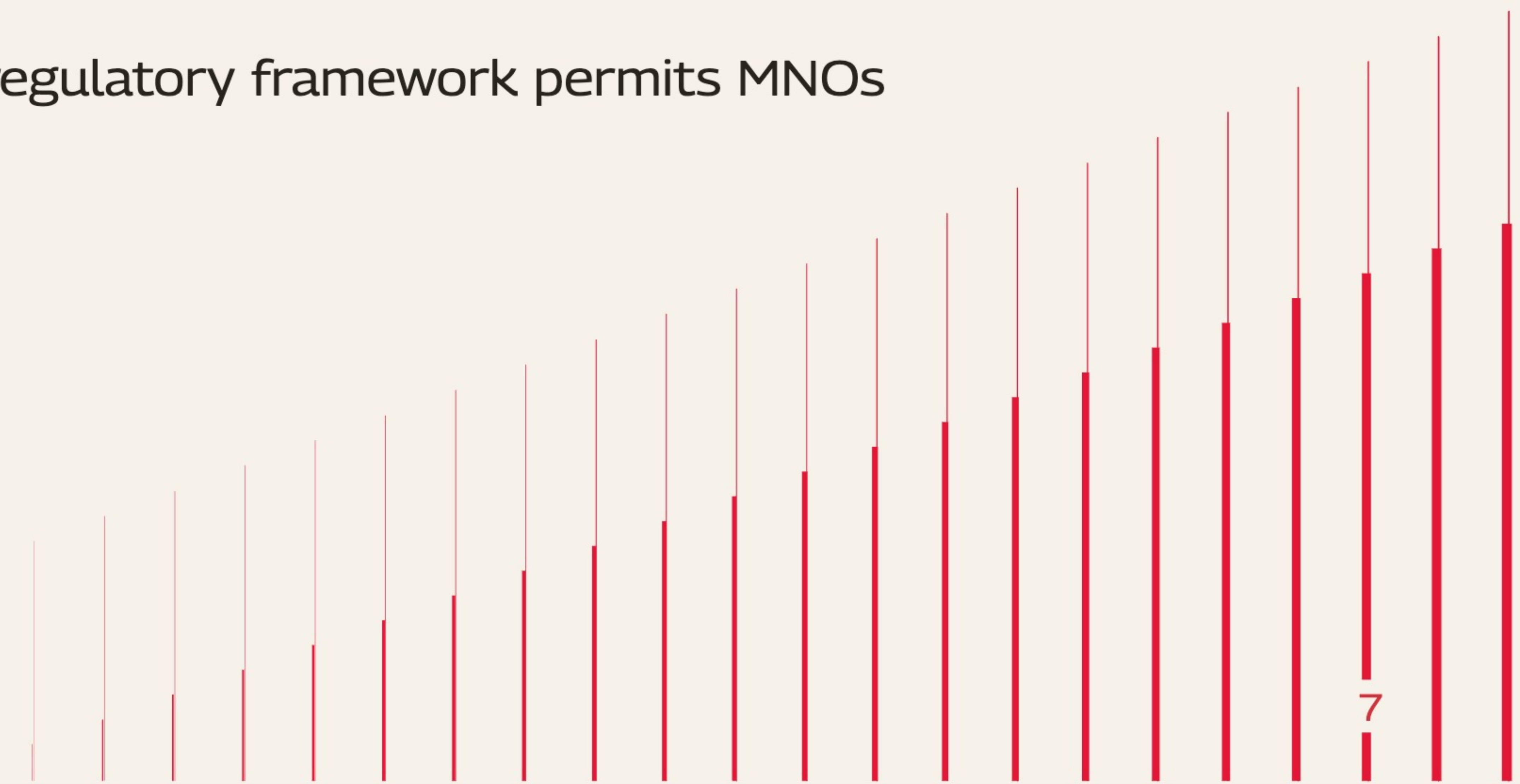
The Regional Landscape: Europe and the UK at the Forefront

By mid-2026, the convergence of telecommunications and satellite technology has shifted significantly from announcements to commercial launches.

Europe and the United Kingdom are now at the forefront of global commercial activities.

A pivotal development in Europe has been the establishment of the Vodafone AST SpaceMobile joint venture, known as 'Satellite Connect Europe'.⁷ Mobile network operators (MNOs) across 21 EU member states have shown interest, with a commercial launch anticipated in 2026. The IRIS² initiative establishes the sovereign layer of a multi-orbit (LEO and MEO) architecture, with the aim of delivering initial government services by the end of the decade.⁶

The UK is the first Western European market to commercialize D2D. Ofcom's regulatory framework permits MNOs to authorize satellite operators to transmit in their licensed bands.⁷



Other Regions in Brief

Region/ Convergence	Regulatory readiness	D2D Commercial launches	Sovereign/ Security Play	Backhaul & Enterprise	Major Operator Moves
Europe	IRIS ² + ESA/ GSMA	Vodafone, Orange, DT, Telefonica	IRIS ² €10.5 billion SpaceRise	Euteslat One web refresh	Vodafone-AST, DT-Starlink
United Kingdom	Ofcom Dec 2025 framework live	VMO2, VF3,BT/ EE- all in	Limited	BT-Starlink rural broadband	VMO2-Starlink, VF3-AST, BT- Starlink
ANZ	AUS universal mobile obligation	Telstra D2D live Jun 2025	Limited	NZ- Lowest starlink latency	Telstra-Starlink, TPG- Lync
India	Spectrum pricing pending	Pre-Launch	India NTN/ Digital Sov.	Jio, Airtel, Oneweb licenses	Airtel-SpaceX, Jio-SES, Airtel-Oneweb
Middle East	UAE/KSA Active	STC-AST 2025	Strong sovereign stance	E&- SES,1.25 GBPS Feb 2026	STC-AST \$175M, e&- SES

High Moderate Low

Figure 1: Regional Snapshot of Telco-SATCOM Convergence Intensity (2025-2026).



The Evolving Role of SATCOM in Telecom Value Creation

As convergence progresses, the function of the telecom operator is also transforming. The main focus is to explore the extent of value to capture, the level of control to maintain, and the necessary maturity of the operating model to ensure sustainable competition.

Three strategic roles are taking shape, each with a new path to commercial value.

Coverage Extender

The operator employs satellite technology to address geographic or service gaps in areas where terrestrial connectivity is either unfeasible or unavailable. Commercial differentiation is minimal; the ability to capture value is limited; profit margins typically favor the provider with the lowest-cost capacity. Frequently, the segment an operator enters first is not the one that ultimately delivers the greatest value.

Hybrid Network Operator

The operator integrates terrestrial and satellite services into a cohesive service offering. The focus shifts from merely reselling access to orchestrating hybrid services, ensuring consistent SLAs, and enhancing customer experience across various access domains. This approach necessitates more advanced OSS/BSS integration, common service catalogs, hybrid charging and assurance mechanisms, and a more robust partner operating model. Profit margins significantly increase as the operator takes ownership of the policy, service, and assurance layers.

Outcome Orchestrator

The operator focuses on selling mission outcomes instead of merely providing connectivity products, emphasizing continuity, resilience, sovereignty, mobility, and real-time operational support across various industry sectors. The willingness to pay is linked to the critical nature of the business rather than the cost per bit, allowing the operator to secure the highest strategic and commercial value. This approach necessitates robust operating model maturity, AI-driven assurance, cross-domain service operations, regulatory-grade controls, partner abstraction, and a business design that integrates SATCOM into enterprise, government, and wholesale offerings.

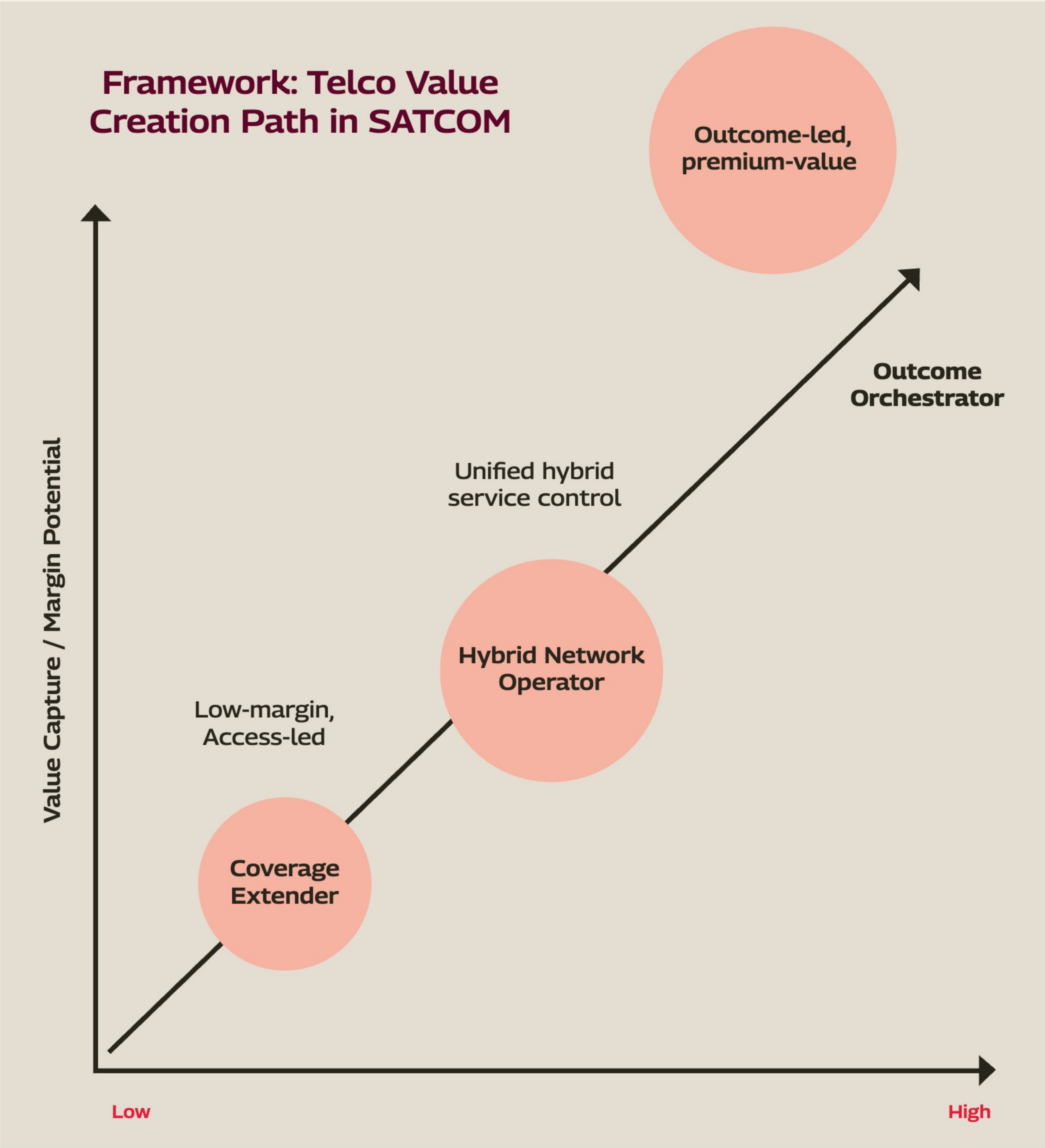


Figure 2: Operator Control / Ownership



Dimension	Coverage Extender	Hybrid Network Operator	Outcome Orchestrator
Commercial model	Satellite sold as a coverage extension or pass-through capacity	Hybrid offers with defined SLA and customer ownership	Outcome-priced vertical solutions with premium SLAs
Platform / OSS-BSS	Minimal integration; bespoke handling	Standardized catalog, charging, SLA logic	Unified policy, assurance, charging, API-led monetization
Operations and Assurance	Manual / partner-led	Cross-domain service assurance	AI-led assurance, predictive ops, continuity by design
Governance and Partner Model	Contract-by-contract/project-based	Partner management with common controls	Central orchestration office; partner abstraction and sovereign control



The Connectivity Value Stack

To understand where SATCOM value will be generated, we delineate the connectivity value chain into five sequential layers. Each layer represents a distinct capability area where operators can unlock new opportunities and differentiate their offerings.

Layer	What it represents	Who captures value today	Where does the SATCOM value migrate next
Capacity	Raw satellite and terrestrial capacity, bandwidth, and spectrum	Satellite operators and infrastructure owners with performance	Commoditizing prices will continue to fall as supply expandsallocation
Connectivity	Provisioned, addressable connectivity service	Telcos, MVNOs, and satellite-native players	Differentiation only via reach, multi-orbit composability, and reliability
Service	Bundled hybrid services with SLAs, charging logic, and customer ownership	Hybrid network operators with mature OSS/BSS	Margin expansion zone-telcos own the policy and customer experience plane.

Layer	What it represents	Who captures value today	Where does the SATCOM value migrate next
Assurance	AI-led service assurance, predictive incident response, sovereignty-grade compliance	Few operators today, mostly partners-led	Premium-tier assurance becomes a paid product, not a background function
Outcome	Mission outcomes are priced for business continuity, sovereignty, mobility and real-time data	Selectively delivered by SIs and vertical specialists	The highest-value layer—telcos that win here own the customer relationship and the margin pool

Strategic Direction



Each step requires more capability investment but also yields significantly higher margin, defensibility, and customer ownership.

Satellite-Driven Monetization Models for Telcos

SATCOM monetization encompasses a portfolio of seven unique revenue streams, each characterized by its own commercial dynamics. Operators should focus on the SatCom opportunities that offer the strongest combination of value, control, and scalability.

SATCOM Monetization Pathways

Layer	Monetization Use Cases	Where The Money Comes From	Telco Proposition
1	Direct satellite-enabled connectivity revenue	D2D messaging, SOS, premium subscriptions, and consumer ARPU (Average Revenue Per User) uplift	Bundled into mobile plans; partner-led
2	Enterprise and vertical solutions	Resilience, backup, business continuity, energy, mining, logistics, healthcare	Retail-owned, SLA-led
3	Rural and underserved expansion	Universal service obligations, regulator-backed builds, hybrid fixed wireless	Public-private; subsidy-eligible



Layer	Monetization Use Cases	Where The Money Comes From	Telco Proposition
4	Backhaul augmentation	LEO-based 5G backhaul; rapid site activation; cell-site resilience	Wholesale or own network
5	Mobility verticals	Maritime, aviation, rail, automotive, logistics fleets	Vertical-specific, contract-led
6	Private networks and mission-critical	Public safety, defense, critical infrastructure, sovereign comms	Contract-led, regulated-grade
7	Wholesale, B2B2X and ecosystem plays	API exposure, capacity resale, MVNO-style models, data-as-a-service	Platform and developer-led

Realistic evidence supports near-term concentration in Lanes 1, 2, 5, and 6, with Lanes 4 and 7 maturing rapidly.



Three observations matter for boardroom audiences

Capacity is Commoditizing

The prices for raw capacity are expected to decrease. The value for operators will derive from service integration, assurance of service level agreements (SLAs), and customer ownership.

Outcome Pricing is Emerging

The focus of constructs is transitioning from MHz/Mbps to metrics such as availability, uptime, recovery, and compliance tiers, thereby shifting the emphasis from infrastructure economics to excellence in operating models.

ARPU Asymmetry Matters

Markets with lower average revenue per user (ARPU) show a higher percentage of customers willing to pay. Emerging markets offer strong growth potential thanks to their size and price sensitivity.



Strategic Choices: Where Telcos Should Play

Not all operators should aim for every lane. The choice of portfolio is what distinguishes leaders from others.

Telco Participation Model on the SATCOM Value Chain

Segment	Where it Fits	Commercial Logic	Value Capture
Retail-Owned / Outcome-Led	Enterprise resilience, D2D, critical infrastructure	Telco owns customers, SLA, and billing; satellite is bundled invisibly	Highest ARPU; highest capability requirement
Sovereign / Contract-Led	Government, defense, public safety, maritime/aviation	Long-term contracts, fixed/minimum commitment, and strong regulatory alignment	Predictable cash flow; high contract complexity
Wholesale / Aggregator	Capacity resale, backhaul augmentation, MVNO models	Volume-based pricing; minimal CX ownership	Lower margins, faster to launch
Ecosystem / Platform Play	IoT, vertical industrial, data-enabled services	Usage-based / API-based pricing; revenue shareddata-as-a-service	Strategic upside; requires data and platform maturity

Telco Participation Model on the Satcom Value Chain

Choose a posture by segment - winners run a portfolio of 2-3 simultaneously



Figure 3: Telco Participation Model on the SATCOM Value Chain

From Network Ownership to Control-Plane Economics

An operator's lasting competitive edge will not stem from possessing more towers, fiber, or satellites, but from controlling the control plane: the intelligence layer that manages services across various access types, guarantees performance, and maintains the customer relationship.

What This Shift Means in Practice:

- **From Network Ownership to Orchestration Ownership:** Value will shift to operators that can orchestrate services across multi-orbit, terrestrial, edge, and cloud environments, driving greater control, agility, and customer value.
- **From Asset Productivity to Intelligence Productivity:** AI-led intelligence will become a key differentiator, enabling real-time optimization of routing, pricing, assurance, and capacity to unlock operational efficiency and new value streams.

The control plane is emerging as the most vital asset in the telecommunications sector. Operators who develop and possess it will seize a significant share of value as satellite communications and terrestrial networks merge into a unified, intelligent connectivity platform.

Control Plane Economics: The Four Strategic Shifts

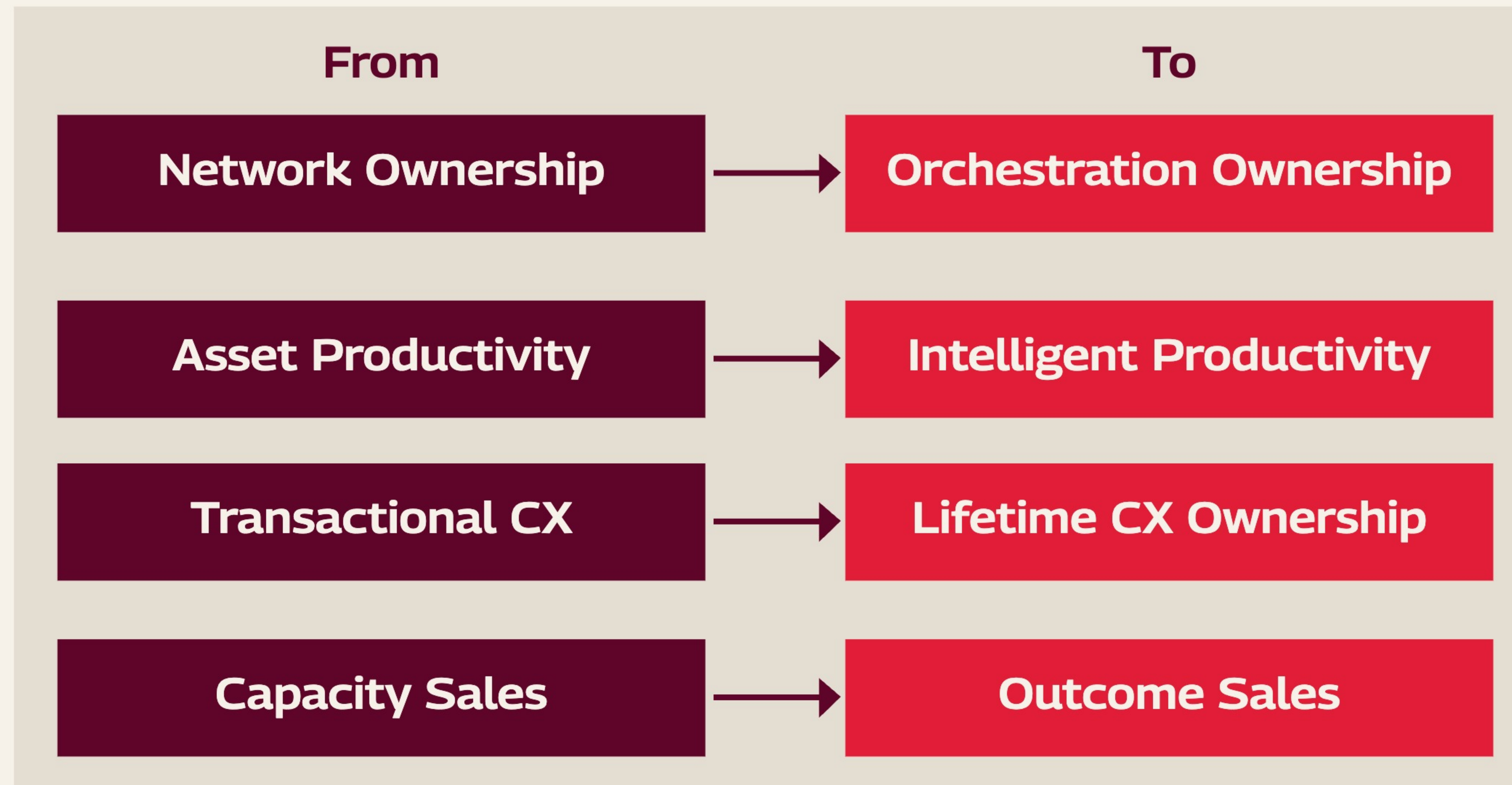


Figure 4: Control Plane Economics and Shifts

An AI-Native Operating Model for Hybrid Connectivity

In the era of satellite communications, artificial intelligence serves as the fundamental operating backbone. Hybrid connectivity is intrinsically dynamic, characterized by multi-orbit, multi-partner, multi-domain, and multi-SLA components. A human-led operational model cannot react quickly enough.

Four Domains where AI Defines the Operating Model

Domain	What AI delivers	Operational outcome
Orchestration	Real-time, policy-driven routing across GEO, MEO, LEO, and terrestrial networks; dynamic capacity allocation; and SLA-aware traffic shaping.	Higher reach, faster response, and lower cost-to-serve.
Assurance	Closed-loop assurance, anomaly detection, predictive incident response, and automated remediation across domains.	Lower MTTR (Mean Time to Repair/Recovery), premium SLA monetization, and continuity by design.
Optimization	AI-driven capacity contracting, demand forecasting, dynamic pricing, and partner economics optimization.	Higher margin, reduced capex risk, faster anchor-customer payback.



Domain	What AI delivers	Operational outcome
Decision-making	Service design recommendations, vertical-solution composability, and sovereign-grade compliance reasoning.	Faster time-to-market, stronger customer-experience differentiation.

TechM Hybrid Connectivity Maturity Model

Operators progress along a connected-capability curve, transitioning from coverage extension to complete autonomous connectivity. This proprietary TechM maturity model provides leadership with a distinct self-assessment framework, directly correlating with the three strategic roles previously outlined.

Stage	Operator profile	Capability signals	Strategic role
Coverage Extension	Project-based satellite deals: satellites are used to fill gaps in terrestrial coverage.	Fragmented SLAs, manual provisioning, low repeatability, and partner-led delivery.	Coverage Extender
Hybrid Network Operator	Standardized SATCOM offers unified BSS handling of hybrid services and a consistent customer experience.	Common service catalog, SLA templates, integrated charging, hybrid assurance, and partner controls.	Hybrid Network Operator

Stage	Operator profile	Capability signals	Strategic role
Outcome Orchestrator	Outcome-based SLAs; AI-driven assurance; vertical solutions at scale; sovereignty and API exposure embedded.	Closed-loop assurance, predictive analytics, sovereign deployment, multi-tenant platform, and API monetization.	Outcome Orchestrator
Autonomous Connectivity Enterprise	Fully AI-native connectivity business; self-optimizing, self-healing, self-monetizing; the control plane is the product.	Intent-based networking, autonomous decision-making, agentic operations, real-time outcome optimization, and ecosystem-native business design.	Future-state (2030-2035)

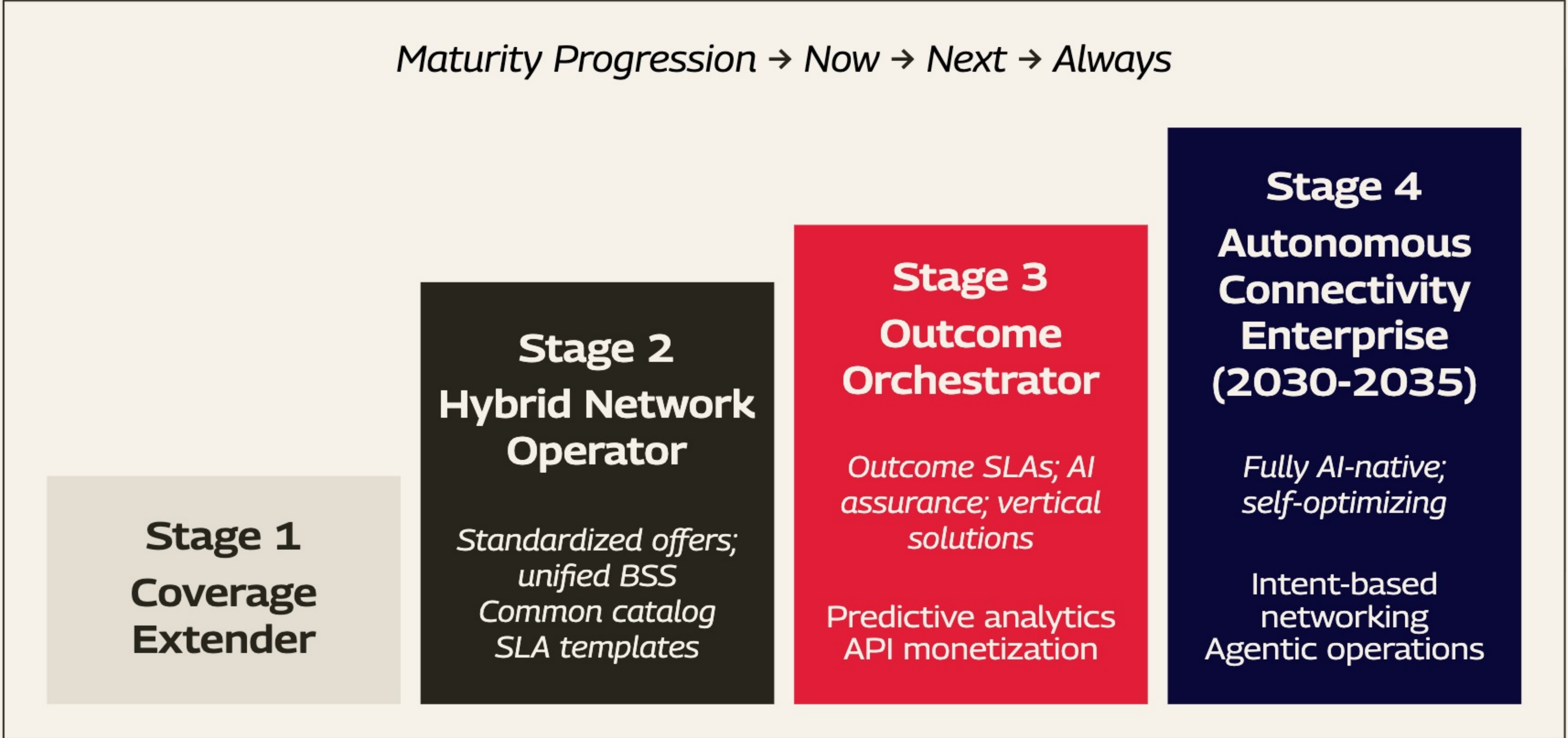


Figure 5: TechM Hybrid Connectivity Maturity Model

Business Architecture Blueprint

Layer	What it defines	Hybrid-connectivity instantiation
Value streams	How value flows end-to-end from market opportunity to monetized outcomes.	Hybrid offer design → activation → assurance → SLA-based monetization → renewal/upsell.
Business processes	Standardized, repeatable activities that deliver each value stream.	Unified order-to-cash, partner onboarding, hybrid assurance, sovereign compliance, and outcome reporting.
Capabilities	The “what we must be able to do” is independent of the organization, system, or vendor.	Multi-orbit service design, SLA-aware charging, cross-domain assurance, partner abstraction, and AI orchestration.
Operating model	How capabilities are organized, resourced, and governed.	SATCOM is embedded across product, network, enterprise, and wholesale BUs (Business Units) with a central orchestration office.
Governance and outcomes	How performance is steered, measured, and reported.	Outcome-based KPIs (ARPU uplift, MTTR, SLA attainment, and partner margin) are reviewed by an integrated VRO.



Channels and Experience	Customer portals, partner portals, agentic AI assistants, omnichannel experience, and NaaS marketplaces	Single experience across terrestrial and satellite; protects CX ownership
Business Applications	Catalog, CRM, order management, SLA-aware billing, partner settlement, and vertical solution composer	Productizes hybrid offers; ensures consistent commercial logic
Orchestration and Control	Service orchestration, policy engine, multi-orbit routing, dynamic capacity allocation, and SLA arbitration	The control plane-where margin and customer ownership are decided
Data and AI	Unified data fabric, real-time telemetry, AI/ML models, predictive analytics, and agentic decisioning	Powers AI-native assurance, optimization, and outcomes
Integration and APIs	Open APIs, TMF(TM Forum)/3GPP standards, partner abstraction, ecosystem onboarding, and sovereign data residency	Preserves optionality, avoids vendor lock-in, and enables ecosystem plays
Network and Infrastructure	Satellite gateways, multi-orbit access (GEO/MEO/LEO), 5G/NTN core, edge compute, and terrestrial network	Provides the underlying connectivity capacity and reach

Risks, Barriers, and Success Factors

SATCOM is not a one-size-fits-all solution. The biggest risk for telecom operators isn't technical, regulatory, or commercial; it's structural. Operators who treat SATCOM as just another network add-on, rather than redesigning their connectivity operating model around it, will stay stuck at Stage 1 or Stage 2 while the market moves ahead.

A Practical Roadmap for Telcos

The approach involves prioritizing **early monetization (now)** to finance the **platform investment (next)**, which subsequently enables access to the higher-value **outcome orchestration tier (always)**.



How the Roadmap Maps to the Maturity Stages

Coverage Extender → Hybrid Operator

The roadmap weight is on now. Focus on monetizing today's high-WTP lanes while starting the next-stage convergence.

Hybrid Operator → Outcome Orchestrator

Roadmap weight shifts to Next. The control plane, AI-led assurance, and outcome-based commercial logic become central.

Outcome Orchestrator → Autonomous Connectivity Enterprise

Always becomes dominant. The operator runs continuously on AI-native operations, with the control plane itself the product.

The 2030-2035 Vision with Autonomous Connectivity Enterprise

By the early 2030s, the dominant operators will differ significantly from the current mobile network operators (MNOs) that offer satellite products. They will function as autonomous connectivity enterprises in which artificial intelligence continuously manages orchestration, assurance, optimization, and decision-making across all connectivity domains.

Three Characteristics Define the Future State

Unified Hybrid Connectivity as a Singular Platform

Terrestrial, satellite, edge, and cloud services merge into one intelligent service layer, remaining invisible to the customer while being meticulously managed by the operator.

Autonomous Business Operations

Intelligence, not infrastructure, is what the operator sells. Networks self-optimize, services self-heal, partners onboard through open APIs, and commercial performance is measured and settled automatically against outcome-based SLAs. The operator monetizes not capacity, or even connectivity, but the intelligence layer that guarantees them.

Outcome Ownership at Scale

The monetization model is built around availability, recovery, sovereignty, and continuity outcomes and is repeatable across verticals and geographies.

Operators who initiate the transition from stage two to three within the next 24 to 36 months are likely to achieve stage four by the early 2030s. Conversely, those who postpone this transition may discover that the orchestration layer has already been claimed by others.



Conclusion

Satellite communications have evolved into a strategic component of the telecommunications value chain, rather than remaining a peripheral network. The market, technology, and regulatory environments have progressed in tandem, which is rare.

For telecommunications operators, the necessary strategic approach involves portfolio management: selecting a participation strategy by segment, establishing a cohesive control-plane platform, and safeguarding customer ownership and SLA integrity as sustainable sources of value. Tech Mahindra partners with operators through this shift, bringing the advisory depth and delivery scale that portfolio management at this level demands.

The operators that will succeed are those that transform satellite communications into a business model. The shift from orbital assets to value-driven outcomes will define the next phase of hybrid connectivity, with the next 24-36 months shaping operators' roles in this emerging ecosystem.



About the Authors



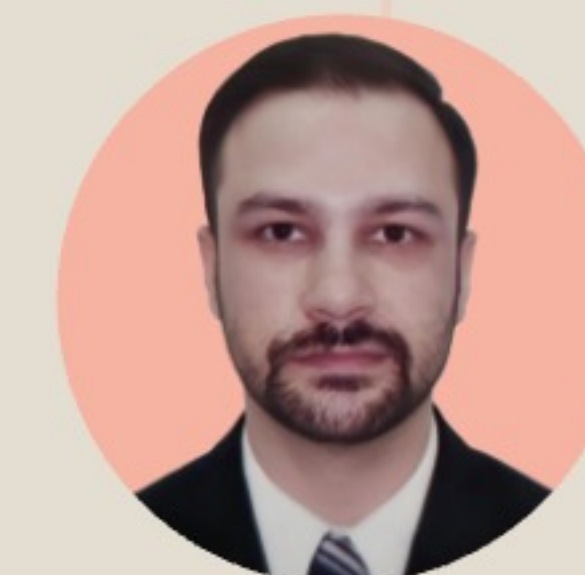
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