TECH mahindra

Unlock Spectrum Of Possibilities

Grow. Empower. Transform

Preface

The telecom industry is facing a perfect storm. On one hand, there is extreme demand for network capacity, while on the other, there is plateauing revenue, sub optimal customer experience, and continuous investment cycles driven by 5G rollouts and digital service demands.

This pressure is amplified by technological shifts such as cloud-native networks, agentic AI, open APIs, edge computing, and cross-industry ecosystem models, that are reshaping what it means to be a telecommunications provider.

At this juncture, the industry is already rethinking how they create value, not just through connectivity, but through ecosystems, platforms, and intelligent digital services. This is where unlocking a wider spectrum of possibilities becomes a strategic necessity. While non-connectivity services currently represent approximately 25% of operator revenue, they are the primary engines of future growth.1 In a world where expectations rise faster than margins, opportunities aren't found in bandwidth alone. They emerge at the intersection of intelligence, experience, and ecosystems, working together to create sustained value. This is particularly important for the communications segment to prepare for the agentic era and lead the AI-led transformation.

Amol Phadke
Chief Transformation Officer, Tech Mahindra

Unlock Spectrum of Possibilities

Communications technology today does more than connect devices. It connects **people, platforms, and possibilities.** Every connection, every wavelength and frequency, represents an opportunity to create meaningful impact.

As this mindset becomes universal across the industry, the need for a new approach is clear.

That's why we're introducing a refreshed playbook - one aligned to where the market is going and how we, with our partners, will lead what comes next.

The playbook is grounded in three pillars:
GROW. EMPOWER. TRANSFORM.

Together, they define how we create value in the next era of communications.

1. Unlock Business Spectrum (Grow)

The shift from connectivity to value orchestration is accelerating. With 5G, IoT, private networks, fintech, AI marketplaces, and API-based monetization, operators can build entirely new growth engines.

Tech Mahindra powers telcos to:

- Scale enterprise offerings
- Create cloud-, edge-, and AI-driven services
- Build B2B2X models
- Accelerate diversification into vertical-specific solutions
- Monetize platforms and APIs

Success Stories

We created a B2B2X digital marketplace ecosystem for European Tier-1 telcos using industry APIs (Camara and MEF) to power use cases such as Drone as a Service and Gaming as a Service on our TM forum-compliant BSS platform (Comviva), integrating partner products and services. The platform went live in 6 months, demonstrating faster time-to-market, improved customer experience, and strong revenue potential.

2. Unlock Human Spectrum (Empower)

Connectivity is not just infrastructure; it shapes inclusion, opportunity, and mobility at scale.

We help operators:

- Drive digital inclusion across geographies
- Support communities with accessible digital services
- Deliver AI-enhanced customer and employee experiences
- Empower field forces and care teams with agentic AI

Success Stories

- We enabled private 5G networks in hospital operating rooms for a US-based medical technology leader, delivering deterministic QoS and ultra-low-latency connectivity to support AR/VR-assisted surgeries and real-time device-to-device communication.
- We empowered employees, customers, and partners for a Tier-1 German operator through omni-channel agentic journeys for contact center, retail shops, and digital channels.
- We created a sovereign AI platform for a large Indonesian operator to roll out AI services for small enterprises and citizen services.

3. Unlock Technology Spectrum (Transform)

Networks, IT, data, cloud, and intelligence are converging. To drive cost transformation, enhance customer experience, and manage rising complexity, telcos need to adopt a simplified, cloud native, data driven stack that scales AI. This means creating composable architecture, simplifying platforms, and embedding AI into all business processes – from front office journeys to back office operations – to make service innovation, sales, delivery, and assurance increasingly autonomous

Tech Mahindra enables:

- **Autonomous networks and IT operations**
- **Building an AI platform to 'Agentify' front and back-office processes**
- **Simplification of legacy IT platforms to ODA-compliant architecture**
- **API-driven digital platforms**

Success Stories

- We transformed the IT landscape to drive L4 autonomous operations for a leading European telco with the aim of reducing field costs by 60%, improving NPS by 40%, reducing MTTR by 55%, and modernizing the IT landscape to drive closed-loop automation and intent-based services.
- We modernized core network architecture for a European telco through integrated core transformation, cloud-first and virtualized networks, process streamlining, automation, and AI-enabled program governance, enabling large-scale rollout across 30K+ sites, achieving 60%+ effort reduction, improved network stability, and integration of 450+ RAN sites. Outcome: Intelligent, secure, agile, continuously improving infrastructure.

Our Telco Heritage and Foundation

Telecom has always been at the heart of Tech Mahindra. For four decades, we have evolved from a telecom-engineering specialist into a global transformation partner. Our early roots gave us deep network and platform expertise, which expanded significantly as we grew across digital, cloud, and enterprise technology. Today, that foundation powers our role in helping telcos shift from connectivity to intelligent, ecosystem-led value.

Today, Tech Mahindra remains one of the most deeply embedded partners in global telecommunications:

- Trusted by 80% of the world's telecom operators
- 250+ telco customers
- 30,000+ telco engineers across IT and network
- 4,000+ TM Forum-certified professionals
- Presence across 90 countries via global delivery centers
- We oversee 750,000+ network devices
- Manage 190,000+ cloud-managed security endpoints
- Our footprint spans 450,000+ enterprise sites, serving 150+ direct enterprise customers, including 25+ signature managed enterprise customers for global CSPs.

This demonstrates our deep industry leadership as partners and stewards of the telecom ecosystem. Our heritage gives us empathy for the sector, understanding of its operational realities, and credibility to support its reinvention. So, our new solution playbook for an AI-native telco is built on connected building blocks that collectively reshape customer experience, networks, and growth, with AI at the core of everything it does.

This transformation is anchored in seven core pillars that help operators move from traditional connectivity to intelligent, ecosystem-led value creation.

- Agentic customer and employee experience brings intelligent agents into contact centers, the field, and the back office so every interaction is guided, contextual, and measurable.
- Digital consumers turn telcos into lifestyle providers, combining connectivity with content, fintech, gaming, and devices, orchestrated through super-apps, personalized offers, and loyalty programmes.

- Digital cloud infrastructure modernizes IT and network foundations into a cloud-native, software-defined, secure, and automated platform that supports rapid innovation and edge or IoT services.
- The ecosystem positions telco as a platform orchestrator for partners across domains such as smart homes, energy, and healthcare, with APIs and monetization models.
- Connected enterprise repackages these capabilities for B2B, delivering AI- and cloud-native connectivity, managed services, marketplaces, and agentic sales and service.
- Autonomous networks then make the network AI-ready and largely self-optimising, from planning and deployment to operations and energy management.
- At the center, AI @ Core unifies data, automation, and an agentic platform, creating a virtuous cycle of "Empower, Transform, Grow" across the entire telco.

We are active contributors to TM Forum's member standards community, part of the TM Forum board, and members of the ORAN Alliance and the Bharat6G alliances. These partnerships aren't just credentials—they form the foundation that enables us to empower operators to innovate with confidence.

The Road Ahead

Technology transformation is not just about IT transformation or network transformation. It's about getting the infrastructure ready to outlast the agentic AI era. The telecom industry is currently at an inflection point. Ecosystems are becoming the new competitive arena, and intelligent, autonomous operations are fast becoming the default. The window to embed agentic AI and achieve such a transformation at scale is narrowing. There is an urgent need for technology transformation partners who can deliver with speed and precision.

Tech Mahindra is uniquely positioned to meet this urgency. We can help operators unlock every spectrum of possibility across business innovation, human empowerment, and technology evolution with the credibility of a partner who has operated at scale, delivered across complexity, and built a heritage in telecom that continues to shape the future.

> We believe that every connection, every wavelength, every frequency carries a story, and the future of communications technology lies in turning those stories into meaningful breakthroughs that move the industry forward.

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Scale at Speed™

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