

Infosys® | CONSULTING

C21-Virtual Event : Satellite and the Cloud Innovative Cloud Strategies Infusing Next-Gen Tech

February 12, 2026. 14:00 UK Time

Event [Link](#)

Presentation Topic

•Cloud-to-Orbit Convergence: Six Moves That Will Define Next-Gen Satellite + Terrestrial Networks

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“SATELLITE AND CLOUD TECH”

REVOLUTIONISING GLOBAL CONNECTIVITY AND DATA INTELLIGENCE

Imagine a future where cloud strategies seamlessly infuse intelligence into networks spanning ground, edge, and space.

This convergence of satellite and terrestrial technologies is transforming connectivity into a programmable platform—unlocking next-generation innovation across hyper-converged TMT ecosystems.



Where Is the Market Today — And Why It's Hard

Market Reality (What We See Today)

Hybrid Networks are becoming Norm

Satellite, cloud, and terrestrial networks are converging into a single operating fabric.

Early Commercial Scale Emerging

Pilots are giving way to selective launches (D2D, enterprise, resilience).

Cloud as the Control Plane is evolving

Cloud is evolving from hosting to orchestration, automation, and data intelligence.

Data-Driven Use Cases Rising

Value is shifting from raw connectivity to insights and services.

Ecosystem-Led Growth is the need

Progress increasingly depends on partnerships, not standalone plays.

Structural Challenges (What Holds Scale Back)

Operational Model Complexity

Mobility, latency variation, and dynamic coverage break terrestrial-only operating models.

Automation & Scale Gaps

AI-native orchestration is required; static rules don't scale to NTN dynamics.

Unclear Monetisation roadmap

Profitable, repeatable models beyond connectivity remain difficult to industrialise.

Ecosystem Friction

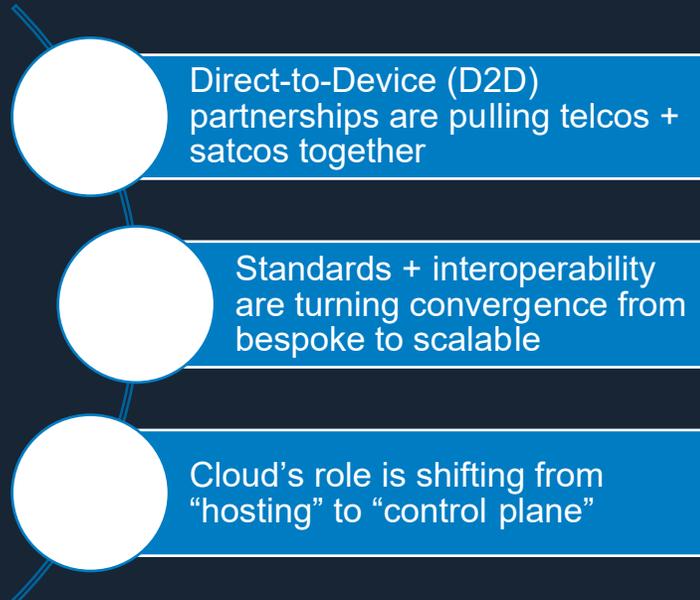
Standards are advancing, but cross-industry coordination is still maturing.

Governance & Regulation

Data sovereignty, spectrum, security, and AI governance slowing the adoption.

Convergence drivers (why “Satellite + Cloud” is accelerating)

Convergence is partnership-led: telcos + satcos + hyperscalers are building one fabric.



Insight 1 — Convergence is shifting value to software + operations

- As satellite becomes part of “everyday” connectivity (D2D, enterprise resilience, mobility), the differentiation moves from capacity alone to:
 - cloud-native ground operations
 - orchestration / policy / observability
 - automation + AI ops

Insight 2 — “Ground equipment dominance” signals where cloud integration attaches

- The SIA/Via Satellite figures show ground equipment is the largest revenue segment (\$150.4B), which is exactly where cloud-managed gateways, virtualised ground, and edge+AI processing can plug in and scale.

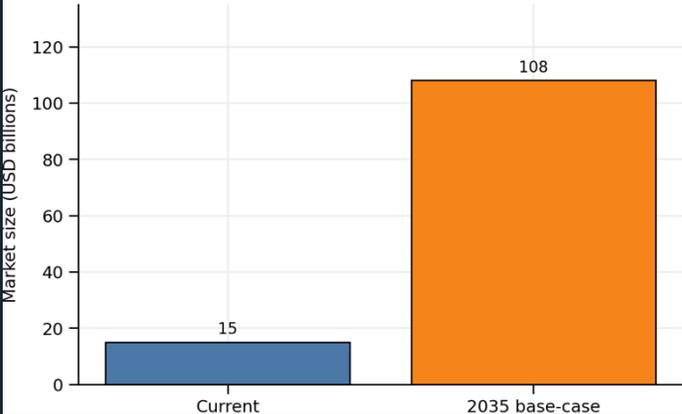
Insight 3 — Partnerships are becoming the default operating model

- Both TM Forum (telco–satco D2D partnerships) and Access Partnership (IoT as a “partnership game”) converge on a single point: the market is moving toward ecosystem delivery models.

Big growth forecasts underline why hyperscalers are interested

Funding pressure is real (and influences partnerships + consolidation)

Satellite Market Size Forecast (Goldman Sachs Research)



(Data source: Goldman Sachs Research article) [inform.tmforum.org]

Six Trends that's shaping the journey

Cloud-to-Orbit Convergence: Six Moves That Will Define Next-Gen Satellite + Terrestrial Networks

- 1 From Orbital Hardware to Software-Defined Platforms**
 - Virtualisation + orchestration trends moving satellites/ground toward cloud-native operations.
- 2 One Network Everywhere (NTN-Terrestrial Convergence)**
 - Stitching multi-orbit satellite with terrestrial 5G/6G and cloud into one operational fabric
- 3 Intelligence at the Edge of Space**
 - Pushing AI/analytics closer to where data is generated to reduce latency and bandwidth pressure.
- 4 Resilience Without Borders**
 - Satellites as an integral resiliency layer for outages, build phases, and major events
- 5 From Space Data to Business Value**
 - Cloud + analytics/AI to operationalise EO/IoT data into monetisable services.
- 6 Telco → Techco → Space-Enabled Ecosystems**
 - The capability/operating-model changes needed to compete in hybrid cloud-connectivity markets.

Why Satellite + Cloud Is Strategic

Cloud-to-Orbit: Redefining the Backbone of Digital Resilience

Hybrid connectivity is no longer niche

Enterprises expect the same digital experience everywhere (remote sites, oceans, air routes, and disaster zones)

Cloud has evolved to deliver the needs

it's not just compute and storage, it is the control plane that standardises operations, security, and observability across distributed assets.

Satellites moving from 'coverage' to core digital infrastructure

resilience, agility, and rapid service innovation are now competitive differentiators-and satellites become part of the core architecture to achieve them.



Need of The Convergence Stack

Convergence is architectural. We're moving from 'separate domains' to one software-defined system, orchestrated and secured consistently. With that context, **the first shift is satellites themselves becoming cloud-native.**

Data Flows from Edge to Orbit

Data is generated at the edge, carried across terrestrial and satellite networks, and unified by cloud and AI as a single horizontal operating layer.

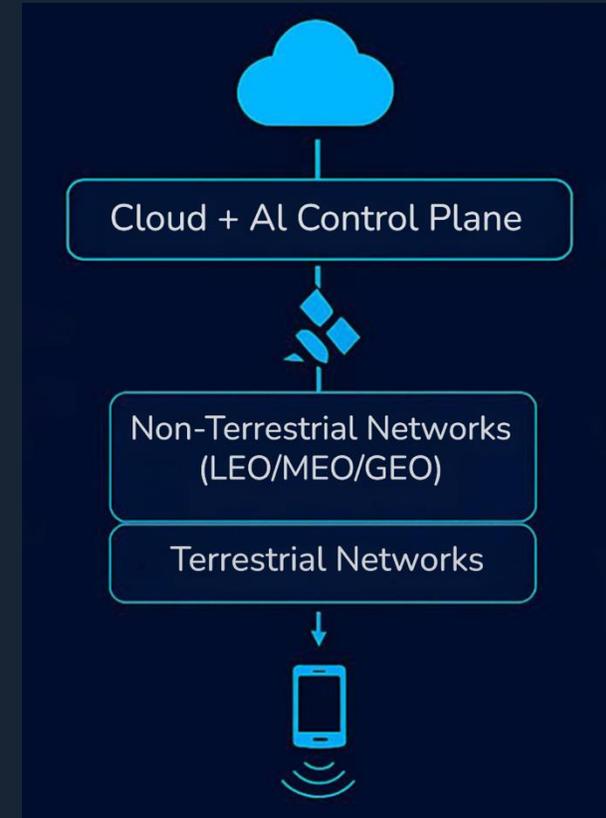
Infrastructure Is Becoming Software-Defined

As ground and space assets virtualise, operations must shift to software-defined, cloud-native control models.

AI-Driven Scale and Efficiency

Edge computing reduces latency and bandwidth costs, while AI becomes essential to operate, optimise, and scale hybrid networks.

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Edge computing reduces latency and bandwidth costs while AI becomes essential to operate, optimize, and scale hybrid network

Shift 1: From Orbital Hardware to Software-Defined Platforms

As satellites evolve from static infrastructure to dynamic network assets, traditional operating models are no longer sufficient.

The Evolution of Satellite Operations in the Era of Cloud-Native Networks

A decade ago, telecom networks began shifting from hardware-centric architectures to cloud-native, software-defined, and automated operations.

That same transformation is now reaching satellite operations—particularly the ground segment—driven by the need for agility, scale, and tighter integration with terrestrial and enterprise digital ecosystems.

Advancing Satellite Telecommunications: Embracing Software and Cloud Innovations

Satellites are now following the proven telecom journey: [hardware](#) → [software-defined](#) → [cloud-native](#)

Virtualisation and cloud orchestration enable faster service rollout, continuous change, and automation at scale, while AI-assisted operations improve utilisation, assurance, and service agility.

The result is greater programmability, shorter change cycles, and seamless integration with telco standards and enterprise cloud platforms.

Infosys brings deep experience from large-scale telco cloud transformations, combining cloud-native engineering, orchestration, and AI-driven operations.

This expertise can be directly applied to digitalising satellite ground systems and operations, helping operators transition to software-defined, cloud-managed, and ecosystem-ready satellite networks.



Transforming
Satellite
Operations



Flexibility,
Speed, and
Integration



Harnessing
Cloud Expertise

Shift 2: One Network Everywhere — NTN–Terrestrial Convergence

Users don't care whether bits travel over fiber, 5G, or satellite - they expect one experience.

The hard problem is integrating policy, security, and service assurance across these access types.

Problem Statement

Hybrid connectivity is now the default, yet **terrestrial and non-terrestrial networks still operate as loosely coupled domains**. This fragmentation creates inconsistent service behaviour, operational silos, and gaps in visibility - making convergence more theoretical than real.

What Needs to Be Done - and the Role of Cloud Orchestration

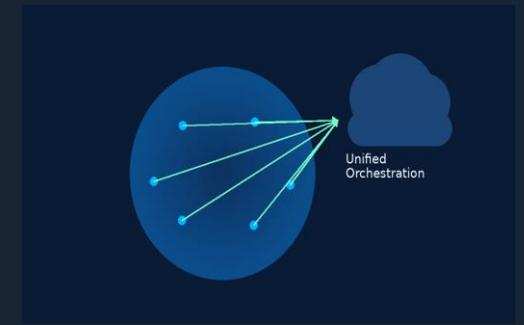
A single, cloud-based abstraction layer is required to unify terrestrial and NTN environments. Cloud orchestration can provide one control plane for lifecycle management, policy enforcement, service assurance, and observability - allowing hybrid networks to behave as a single system rather than parallel infrastructures.

Benefits

With cloud-orchestrated convergence, operators can deliver a consistent end-to-end experience through assured services, dynamic slicing and segmentation, and unified observability.

The outcome is seamless coverage, predictable performance, and governed operations across terrestrial and non-terrestrial networks.

NTN–terrestrial convergence becomes real only when cloud provides a single control plane for experience, assurance, and governance



Key Takeaway

- ✓ Build architecture with a focus on business outcome
- ✓ Establish Cloud as control plane, not infrastructure
- ✓ Establish Importance of Cloud-orchestration
- ✓ Use this as a Natural bridge to AI, automation, and scale

Once the fabric is unified, the next question is: **where do we compute and where do we infer?**

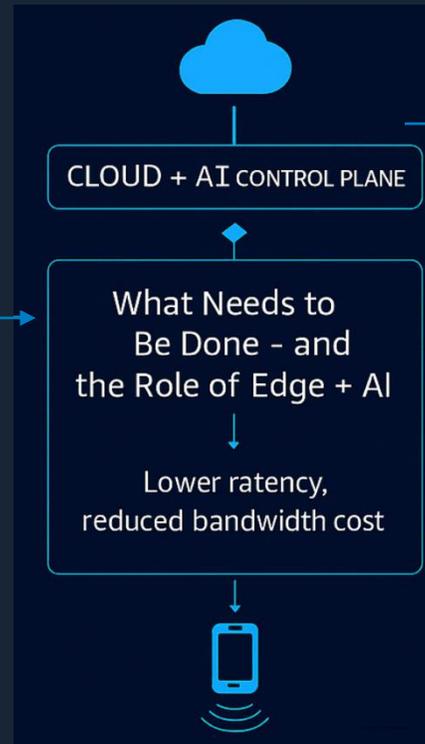
Shift 3: Intelligence at the Edge of Space

Stop Moving Data. Move Intelligence >> Edge Intelligence Is the Only Way to Scale

At scale, intelligence belongs at the edge - not in the backhaul

Problem Statement : Centralisation Breaks at Scale

Data volumes are exploding, and centralising everything in the cloud is increasingly inefficient. Satellites and remote networks generate massive data streams, but shipping raw data to central cloud platforms is costly, slow, and operationally impractical.



What Needs to Be Done - and the Role of Edge + AI

Compute and intelligence must move closer to where data is generated. By pushing filtering, fusion, and inference to the edge - near ground stations, endpoints, and distributed nodes - AI models become part of the network itself, not just applications running on top.

Benefits

Edge-driven intelligence delivers lower latency, reduced bandwidth cost, and faster decision-making. **The design principle is simple but powerful:** send insights, not raw streams, enabling scalable and efficient hybrid satellite-cloud operations.

The outcome is seamless coverage, predictable performance, and governed operations across terrestrial and non-terrestrial networks.

Once When compute is distributed, resilience becomes an architectural requirement

Shift 4: Resilience by Design

Resilience is no longer 'plan B'. In modern cloud and critical infrastructure, resilience is designed-in with multiple connectivity paths. Satellite is a first-class component of that architecture in the new dimension

Problem Statement

Digital services increasingly operate across fragile and distributed infrastructures, where outages, infrastructure build phases, and high-risk events are no longer exceptions but expected conditions.

Traditional resilience models treat satellite connectivity as a fallback, resulting in slow recovery, manual intervention, and unproven continuity during real-world disruptions.

What Needs to Be Done - and the Role of Automation

Resilience must be designed into the architecture, not added as a backup option.

By embedding satellites as an integral part of hybrid networks and using cloud-based orchestration, operators can enable multi-path connectivity, automated failover, and continuous testing across terrestrial and non-terrestrial domains - making resilience observable, repeatable, and provable.

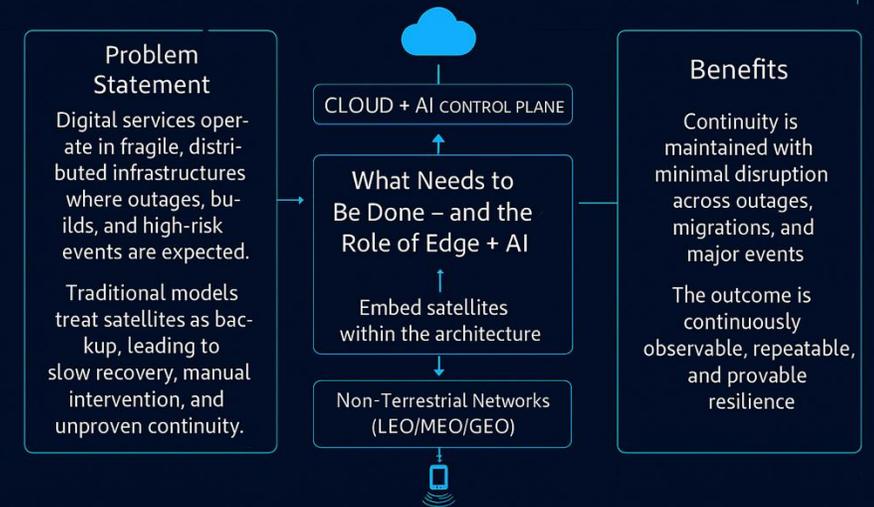
Benefits

With resilience-by-design, continuity is maintained across outages, migrations, and major events with minimal service disruption.

The outcome is measurable continuity, faster recovery, predictable performance, and confidence that resilience mechanisms will work when needed - because they are continuously automated and tested.

True resilience is not a backup plan—it's a continuously tested, automated capability embedded into the network.

Resilience Is Designed, Not Backed Up



Now, beyond resilience and performance, the next big unlock is value creation from space data.

Shift 5: From Space Data to Business Value

Connectivity is the enabler; data is the differentiator. With cloud, you can industrialise ingestion, governance, and analytics - and then AI turns that into products: risk scoring, monitoring, optimisation, compliance, and so on.

The winners won't be one-off analytics projects; they'll build repeatable data products and APIs that partners and customers can consume.

The long-term value is data + intelligence, not only connectivity.



Move from projects to platforms: repeatable 'data products'

Now, beyond resilience and performance, the next big unlock is value creation from space data.

Shift 6: Telco → Techco → Space-Enabled Ecosystems

This is the natural next step: many operators are already on a **Telco→Techco journey** - building platforms, APIs, and ecosystems. **Space capabilities plug into that same model**, but they raise the bar on distributed ops, security, and partner integration.

Key problem here is : **Building new skills and a platform mindset**. The differentiator is who can orchestrate ecosystems and deliver repeatable outcomes at scale.

The journey to space-enabled ecosystems is not about adding satellites—it's about re-architecting networks, operations, and business models for a cloud-orchestrated future.

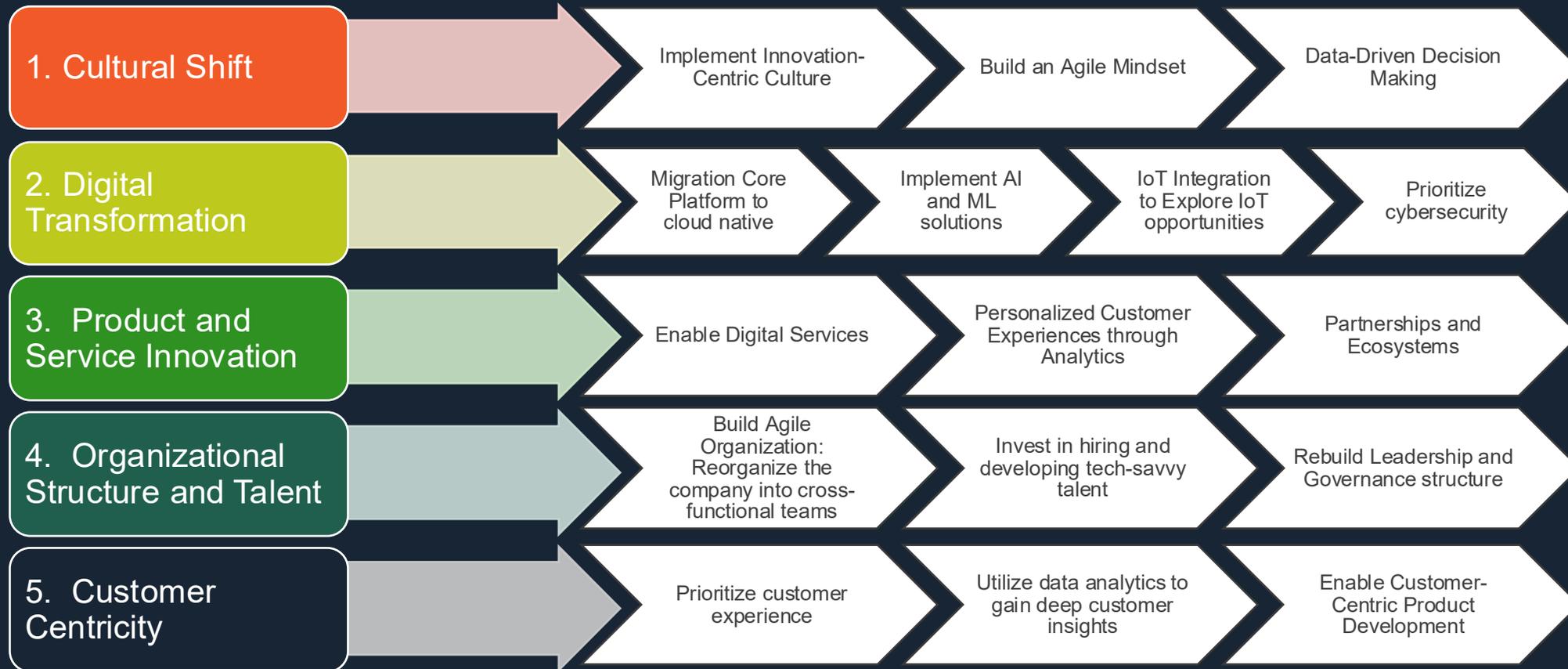


Call for Action:

- Build Ecosystem
- Build Platform capabilities
- Build Skills and Drive Cultural change
- Orchestrate across cloud, network, and data value chains

Key Elements for success in Telco to Techco Transformation

The transformation from a traditional telecommunications company (Telco) to a technology company (Techco) is a complex journey requiring a strategic approach and significant organizational change.



How Infosys is helping the customers in this journey

What Telco Business need to invest-in to deliver the ask and build the foundation to maximise the benefits from Hypercovered Networks capability

adaptability to economic or market conditions,

leveraging technology for data management, and

Embrace innovation for business sustainability and growth

01

**“Build a Bionic Core Business”
Focus on Value creation to transform existing Core Business**

02

Invest to build a Next-Gen Operating Model to handle existing challenges and cater future opportunities

03

Establish AI driven virtualized and cloud native networks to Prepare for upcoming technology disruptions

04

Embrace AI for Innovation, increased productivity and deliver enhanced customer experience

05

**“Telco to Techco Journey”—
Growth Outside the Core
Gear up for Intensified Competition from “Hyperscalers.”**

Infosys PoV and Capabilities in this space

Infosys brings battle-tested telco cloud, orchestration, and AI operations expertise - now directly applicable to digitalising satellite ground systems and hybrid cloud-to-orbit networks.

Capability Area	What Infosys Does	Why This Matters (for Satellite + Cloud and NTN)
1. Cloud-Native Telco Network Transformation	<ul style="list-style-type: none"> ➤ Designs and delivers cloud-native, containerised network functions across core, RAN, transport, and edge. ➤ Enables migration from VM-based virtualisation to Kubernetes-based microservices across public, private, and hybrid clouds. 	Satellite ground systems are facing the same shift—from fixed, hardware-centric platforms to software-defined, elastic, and programmable environments.
2. End-to-End Orchestration & Automation at Scale	<ul style="list-style-type: none"> ➤ Provides cross-domain orchestration and lifecycle management using standards-based frameworks (ONAP, ETSI MANO, O-RAN, TM Forum). ➤ Delivers zero-touch provisioning, network slicing, and closed-loop automation across edge, access, core, and transport. 	Satellite operators must manage multi-domain complexity across ground, orbit, gateways, and spectrum—similar to multi-domain telco environments.
3. AI-Driven Network Operations & Autonomous Ops	<ul style="list-style-type: none"> ➤ Applies AI/ML for predictive assurance, anomaly detection, root-cause analysis, and auto-healing. ➤ Aligns with TM Forum Autonomous Network maturity models to increase operational autonomy. 	NTN environments introduce mobility, dynamic topology, and latency variability that cannot be managed manually or with static rules.
4. Generative AI for Network Design & Operations	<ul style="list-style-type: none"> ➤ Develops domain-specific generative AI for network service design (TOSCA), intelligent NOCs, and accelerated troubleshooting. ➤ Leverages Infosys Topaz and NVIDIA (NIM, NeMo, Guardrails). 	These capabilities directly address growing complexity and change velocity in satellite ground-segment design and operations.
5. Standards-Led, Ecosystem-Ready Engineering	<ul style="list-style-type: none"> ➤ Builds solutions aligned with GSMA, ETSI, 3GPP, O-RAN, and TM Forum. ➤ Enables interoperability across vendors, hyperscalers, device ecosystems, and enterprise platforms. 	Satellite networks are converging with terrestrial standards (e.g., 3GPP NTN); a standards-first approach reduces integration risk and accelerates adoption.

Infosys AI-First Strategy to enable fully autonomous hyperconverged networks

Building the AI-First Organization : The organization of the future will be an AI-first live enterprise

Our Vision

AI at the center

Build an AI-first company

An AI-first company is made out of four building blocks



The AI experience

AI-first firms rethink everything about how they're experienced, from using AI-led assistants to reimagining customer journeys with AI at the center



AI engineering excellence

We explore next-generation software development and platform engineering. We also discuss the advent of AI operations, Data and MLOps for high velocity products



Responsible AI by design

We explore the challenges posed by the explosion of AI, and how organizations will need to have robust processes in place to ensure that the risks are properly managed and mitigated



The AI operating model

What does the future AI-first operating model look like? We discuss how to bring about the changes that are needed

Relevant Key Capabilities with which we are helping clients

Infosys 5G and Network Engineering Services

We plan, design and deploy Private 5G networks and Infosys Network Fiber Rollout and Delivery Service to enterprises



Our network engineering capabilities offer cloud solutions that support high bandwidth, low latency and reliable wireless connectivity

- SDN and 5G – The Next Wave of Network Innovation**
- Infosys Network Fiber Rollout & Delivery Services
 - Next Generation OSS
 - Infosys Private Network for Enterprises
 - Infosys Virtual Network Infrastructure
 - Infosys Smart Network Assurance
 - Infosys Multi Access Edge Computing
 - Infosys Network Function Automation
 - Infosys Slice Manager
 - Infosys NextGen Network Integration Test Engine

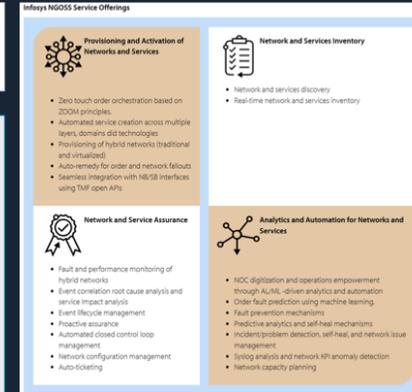
Next Generation OSS

Helping customers getting their OSS ready through Infosys NGOSS Service Offerings

Infosys OSS digitization process follows the principles of TMF Open Digital Architecture, open APIs and ZOOM (Zero-touch Orchestration, Operations and Management). When complemented by adoption of open source technologies, this framework empowers Telecom Service Providers to transform their legacy OSS to NextGen OSS.

Key features of the Infosys NGOSS framework:

- Cloud Readiness:** Microservices based, on-demand scalable framework
- Operations Automation:** Support Digital NOC & empowering operations in decision making through AI/ML driven analytics
- Self-learning and Auto-healing:** Policy enabled orchestrator for Hybrid Environment
- Hybrid Network Support:** Support for SDN/NFV, cloud hosted devices, appliances and network functions
- Agility to meet dynamics of programmable and virtualized networks:** Real-time network topology and discovery
- Standardized and Normalized:** In alignment to TMForum ZOOM, Open APIs, Technology Neutral Architecture, TMForum Application framework (TAM), Shared Information/Data Model (SID), enhanced Telecom Operation Map (eTOM) etc.
- Multi-tenancy:** Multi-tenancy capabilities native to the infrastructure
- Domain Agnostic:** Standardized OSS layer catering to all network domains



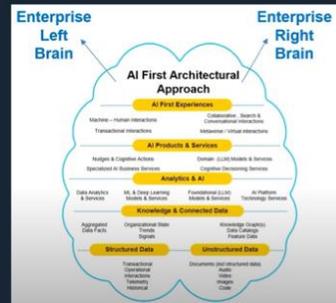
Infosys Topaz : Building an AI-first organization

Infosys' Topaz AI First Innovations including AI-enabled Analytics and AI-enabled Automation to help clients in significant cost savings, improved efficiency and customer experience across industry segments.

Infosys Topaz is an AI-first set of services, solutions and platforms using generative AI technologies.

It brings the **advantage of 12,000+ AI assets, 150+ pre-trained AI models, 10+ AI platforms** steered by AI-first specialists and data strategists, and a 'responsible by design' approach that is uncompromising on ethics, trust, privacy, security and regulatory compliance.

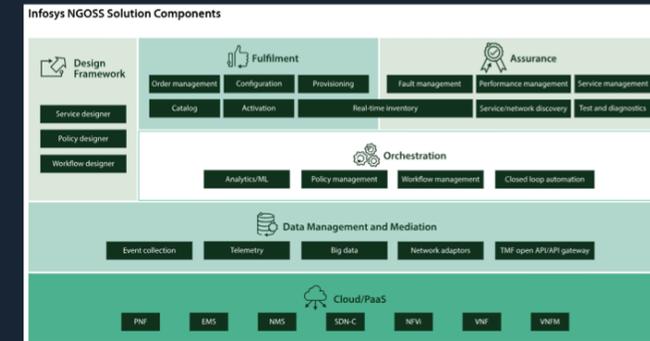
Leveraging Infosys applied AI framework to build an AI-first core that empowers people to deliver cognitive solutions.



- Infosys Topaz Wins at NASSCOM AI Gamechangers Awards 2023
- Infosys Wins 2024 HPE Global AI Partner of the Year Award
- Double Wins for Infosys Topaz at Capgemini Enterprise Adoption of AI Award for General Conversation Chat
- Infosys Topaz Wins Global Award with Business Intelligence Group's Artificial Intelligence Excellence Award
- Infosys Positioned as a Leader for the Second Time in the IDC MarketScape Worldwide Artificial
- Infosys rated as a Leader in HPE Horizon Report for Generative Enterprise Services, 2023

Next Generation OSS

Helping customers getting their OSS ready through Infosys NGOSS Service Offerings



Over past two decades, Infosys has successfully delivered OSS transformation solutions for over 40 global Telecom Service Providers. These offerings are well-supported by more than 800 SMEs, market-driven solutions and a unique set of differentiators that help clients gain maximum value.



**THANK
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