

AI-Native Marketing Platforms: Telecoms Bold Leap Into The Future

CMO Survey Report 2025



Experience Credible Impact

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Executive Summary

The future of telecom marketing is unfolding, powered by AI-native platforms a transformative force poised to redefine the industry's engagement with customers. Unlike traditional AI systems that rely on human intervention, AI-native platforms are built to function autonomously. They thrive in complex, data-rich environments and deliver proactive and intelligent marketing outcomes.

At the core of these platforms are Marketing AI Agents, autonomous decision-makers that revolutionize how telecom companies engage customers and drive business growth. These agents continuously learn and adapt, enabling hyper-personalized interactions, automating intricate processes, and anticipating customer needs in real-time. Picture a Campaign ai Agent launching perfectly tailored campaigns in seconds or a CLV Optimizer Agent predicting customer lifetime value with surgical precision. This isn't fiction—it's today's telecom marketing revolution.

To assess the industry's readiness for this bold shift, Comviva's Research Centre surveyed 100 telecom marketers worldwide (see methodology on page 30). The results are compelling: **62% of marketers believe AI-native platforms will fundamentally transform telecom marketing**, marking a departure from incremental improvements to a complete reinvention of strategies.

Yet, the road to adoption is fraught with challenges: legacy systems, fragmented data, privacy concerns, and a talent gap stand as key hurdles.

This report introduces the **SPARK** Framework, a strategic guide to overcoming these challenges and thriving in the AI-native era:



Seamless Integration: Create unified data layers to unlock AI's true potential.



Revolutionized Talent: Upskill teams to master human-AI collaboration.



Personalized Customer Journeys: Use AI agents to deliver right-time, hyper-relevant messaging.



Key Partnerships: Forge innovative vendor relationships that amplify ROI.



Agile Security: Prioritize ethical governance and transparency in AI operations.

Just as electricity sparked the Industrial Revolution, AI-native platforms, guided by the SPARK Framework, are igniting a new era for telecom marketing. The time to act is now. Embrace AI-native platforms and the SPARK Framework, and you won't just adapt to the future—you'll lead it.

Key Findings

1

The telecom industry stands on the brink of an AI-driven revolution, with 62% of respondents convinced that AI-native platforms will redefine marketing as they know it. The shift is already underway: 13% of trailblazing marketers are harnessing AI-native platforms to unlock game-changing results, while 31% are actively piloting possibilities to test their transformaing potential. Meanwhile, a decisive 51% are gearing up for full-scale adoption within the next two years, signaling that the industry is at a critical tipping point.

2

Skyrocketing investments, surging returns, as telecom marketers are channeling 35% of their budgets into marketing AI agents, anticipating an impressive 130% ROI. To achieve these ambitious outcomes, they are prioritizing customer retention (20%), maximizing lifetime value (16%), and boosting revenue per user (14%) as their top business goals.

3

Marketers' AI ambitions hit roadblocks, with legacy systems (37%) and data integration challenges (33%) leading the pack. Issues like poor data quality (30%), security concerns (24%), and talent shortages (21%) add complexity, making the path to AI-driven success an uphill battle.

4

Laying the foundation for AI-native platform success, 72% of marketers are addressing data silos through unified layers, while 66% are upgrading legacy systems, and 64% are focusing on data governance.

5

Speed is the ultimate competitive advantage, and 61% of marketers are embracing AI agents to cut campaign execution time in half. This increased efficiency enables marketers to adapt swiftly to customer demands, test strategies in real-time, and seize market opportunities at lightning speed.

6

Trust takes centre stage, with 71% of telecom marketers identifying data breaches as their biggest concern, 67% emphasizing ethical data use, and 65% demanding transparency in AI decision-making, highlighting an urgent call for robust governance to safeguard data and uphold reputation in the AI-driven era.

7

The rise of AI-augmented marketers is here, with 68% of marketers embracing it as the catalyst for a future driven by innovation and strategic excellence. AI isn't replacing human talent it's redefining what talent can achieve. By embracing this shift, marketing teams can unlock a new era of collaboration, creativity, and strategic brilliance.

8

Forging partnerships that deliver, as 44% of respondents are strongly willing to explore new vendors, and another 28% consider change if needs are unmet. By delivering outcome based results, proactive insights, and unwavering transparency, technology providers can transform their partnerships with telecom marketers into engines of growth and innovation.

The Future of Telecom Marketing: Powered by AI-Native Platforms

The telecom industry is on the brink of a marketing revolution, as 62% of leaders believe AI-native platforms will redefine the game. With unmatched personalization, efficiency, and customer engagement, these platforms empower telcos to outpace competitors. Yet, the path to adoption is unfolding in distinct phases, shaping the future of the industry:



Trailblazing Early Adopters (13%): Leading the AI revolution. Only 13% of telecom leaders have adopted AI-native platforms, but their bold moves are rewriting the rules (see Figure 1). A leading US telecom provider deployed a Real-Time Offer Agent to track customer journeys. When this agent detected a user browsing international travel data plans, it autonomously crafted and delivered discounted roaming bundles with loyalty perks within seconds, cutting manual efforts by 20–30% and boosting conversions.



Testing the Waters (31%): Exploring AI's potential. With 31% of telecom companies piloting AI-native platforms, the focus is on feasibility, scalability, and ROI. These pilots provide a clear lens into AI's transformative impact by targeting specific use cases like automated billing inquiries or localized campaigns. From streamlining workflows to boosting cross-sell opportunities, these early experiments are setting the stage for AI-driven success.

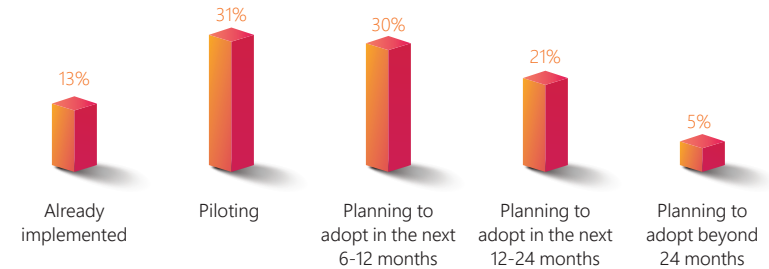


Momentum Builds (51%): The AI Adoption Tipping Point. The majority, 51% of industry respondents plan to adopt AI-native platforms in the next 6 to 24 months. The journey often begins with customer support, where AI-native platforms prove their worth instantly. Imagine a Virtual Assistant agent diagnosing slow internet, resolving the issue in real-time, and seamlessly upselling a premium speed plan tailored to the customer's habits—all in one interaction. Faster resolutions and new revenue streams make this the perfect launchpad for AI adoption.

Figure 1

AI-Native Platforms: Redefining Telecom Marketing

At what stage is your company in the adoption of AI-Native Platform?



62%

Respondents believe that AI-native platforms will transform telecom marketing significantly

"AI-native platforms are more than a technological shift—they are a strategic transformation. They will empower us to predict customer needs, tailor experiences in real-time, and drive unprecedented levels of engagement and loyalty. For telecom marketers, this marks the beginning of a new era where we move from reactive strategies to proactive, predictive engagement—turning every interaction into an opportunity to delight and retain." CMO, a large US telecom player

Big Investments, Bigger Expectations

The telecom industry is rapidly adopting AI-native marketing platforms, with marketers allocating an average of 30% of their budgets—27% investing even higher at 31–40%. This isn't just a tech upgrade; it's a game-changer. Leading telcos use AI to craft hyper-personalized omnichannel campaigns, predicting customer behavior and boosting retention with minimal effort. One European telecom leader saw a 40% engagement surge after deploying AI-driven marketing agents.

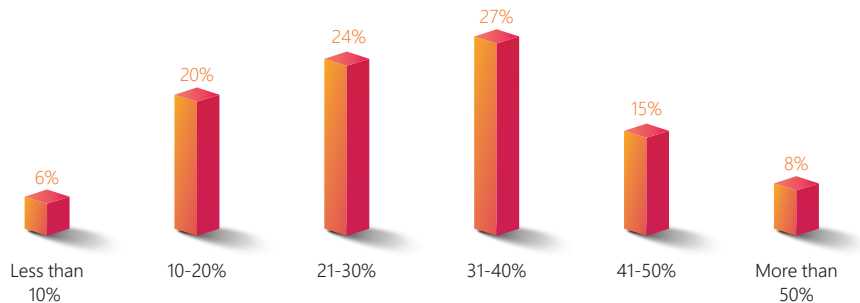
AI-native MarTech investments deliver an impressive 120% average ROI, reinforcing their transformative potential. With predictive churn and real-time decision-making, these platforms cut churn by up to 20%, autonomously optimizing campaigns for exponential value and unmatched ROI.

Figure 2

High-Stakes Investments, Sky-High Returns: Telecom's AI-Native Platform Investment Strategy

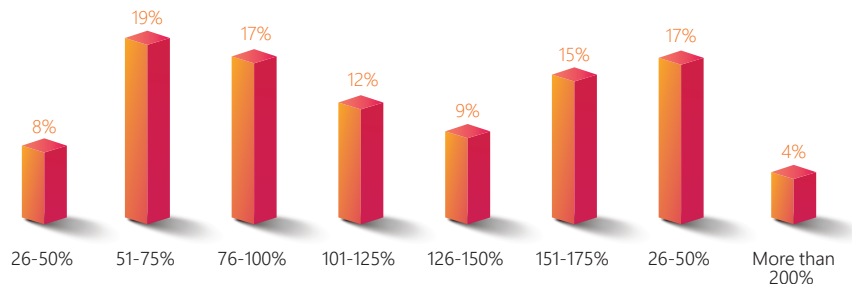
What percentage of your marketing budget do you plan to dedicate to in the next 12-24 months?

Average = 30%



What level of ROI does your organization expect from it's AI-native MarTech investment?

Average = 120%



Chasing ROI: Turning Big Bets into Bigger Wins

For telecom marketers, sky-high ROI isn't about bigger budgets—it's about smarter moves. AI-native platforms are rewriting the rules with predictive intelligence and autonomous execution. Telcos are tapping into these game-changers to supercharge loyalty, maximize lifetime value, and drive revenue per user like never before:



Winning the Loyalty Game: Retention Tops the Charts (20% Rank It #1).

Customer retention drives growth, and telecom marketers focus on keeping customers engaged. AI-native churn agents monitor usage, billing, and support data, identifying at-risk customers in real time. Before they consider leaving, AI launches targeted campaigns with personalized deals. T-Mobile's AI enhances this by analyzing intent and sentiment to deliver hyper-personalized next-best actions.



Maximizing Lifetime Value: Turning Customers into Superfans (16% Rank It #1).

Retaining customers isn't enough; telecom marketers turn them into loyal superfans who spend more and stay longer. AI-native platforms identify high-value customers and nurture them with premium services, perks, and upsells. Vodafone's AI-driven innovation boosted customer lifetime value by 25%, transforming insights into action and driving revenue growth.



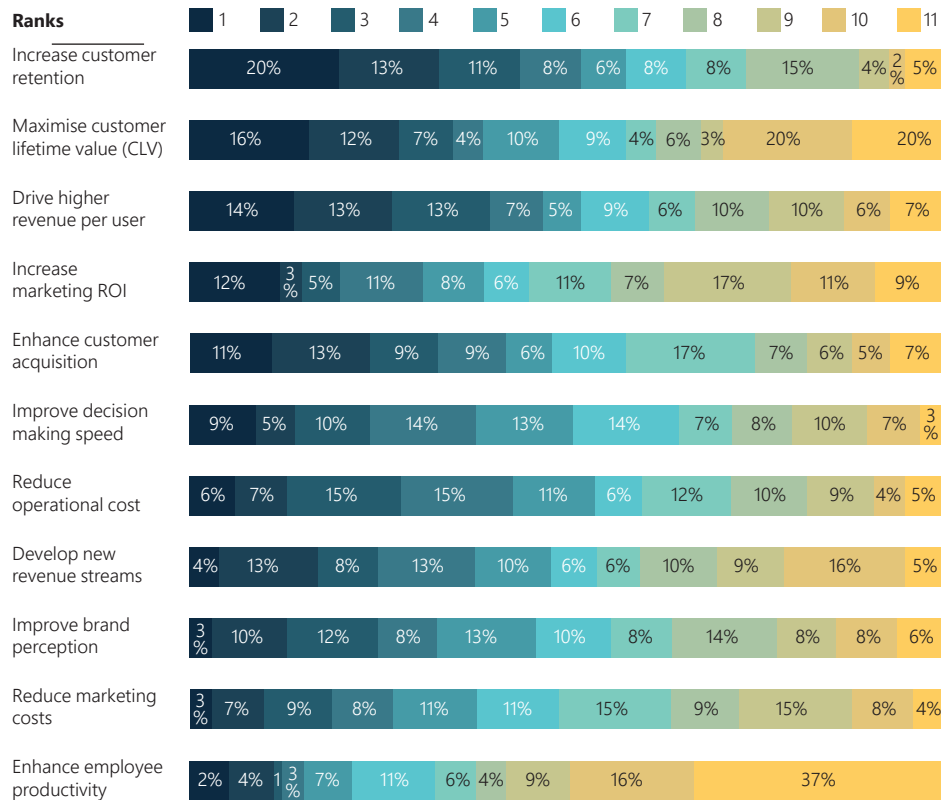
Boosting Revenue Per User: Getting More Bang for Every Buck (14% Rank It #1).

AI-native platforms drive revenue growth by identifying cross-sell and upsell opportunities without straining operations. By analyzing customer data, AI delivers precise recommendations like premium bundles or faster broadband and autonomously optimizes campaigns. Every interaction becomes a revenue opportunity, helping telcos stay ahead of the curve while exceeding ROI expectations.

Figure 3

ROI Rocket Fuel: Telecom's Top Priorities Powered by AI-Native Platforms

Rank the following objectives for adopting from most important (1) to least important (11) based on their relevance to your organization.



"Our top objective is improving customer lifetime value (CLV). One example is segmenting customers and offering personalized upgrades, like 5G bundles, for data-heavy users. This strategy resulted in a 20% revenue boost per user while enhancing customer satisfaction." VP-Marketing; A Telecom Player in APAC

Quick Take: Understanding Conventional AI Vs. AI-Native Platforms

The gap between Conventional AI and AI-native platforms isn't just technical it's the leap from incremental improvements to transformational growth. While retrofitted Conventional AI offers limited agility, AI-native platforms are built to thrive, seamlessly delivering real-time insights, predictive power, and autonomous decision-making. Unlike basic chatbots, for example, AI agents dynamically craft personalized marketing conversations, gather feedback, and build loyalty, adapting on the fly without constant human intervention.

Aspect	Conventional AI	AI-Native Platforms
Integration	Retrofits into existing systems, often requiring manual adjustments.	AI-driven for seamless telecom specific operations.
Data Processing	Processes data in predefined batches, limited to structured formats.	Real-time integration and processing of structured and unstructured data to deliver actionable insights for telecom operations.
Decision-Making	Relies on static algorithms with limited self-learning applications.	Leverages real-time decision models that evolve dynamically, optimizing telecom operations with minimal manual effort.
Personalization	Uses basic segmentation, leading to generic personalization. While NBO systems enhance tailoring, they refresh hourly instead of real time.	Enables hyper personalized interactions using real time behavior and network insights.

Aspect	Conventional AI	AI-Native Platforms
Adaptability	Limited to pre-set rules and workflows.	Continuously adapts to new trends, preferences, and competitive landscapes.
Scalability	Scaling for large campaigns is resource intensive but can handle millions of subscribers. Real time scalability is possible through a cloud based setup, though it may require additional configuration and optimization.	Effortlessly scales to manage millions of subscribers with automated workflows, leveraging cloud native architectures for seamless real-time scalability without manual intervention.
Predictive Capabilities	Not limited to historical trends modern implementations can also learn from near real-time data. However, broader predictive capabilities may still depend on system design and data refresh intervals.	Utilizes advanced real time learning models that continuously ingest and analyze streaming data, proactively forecasting customer needs, detecting churn risks, and optimizing engagement strategies without delays.
Use Cases	Enhances processes, delivering near real time offers using predefined rules and learning models, though responsiveness depends on system architecture and data speed.	Powers AI-driven innovations like real-time offers, smart support, and dynamic pricing, using continuous learning and autonomous decisions for fast response.

Preparing for the Future

Adopting AI-native platforms comes with its share of challenges, but addressing them strategically is key to unlocking their full potential. Our survey insights reveal the top hurdles telecom marketers must overcome to pave the way for AI-driven success:



Integration with Existing Systems (37% Rank It #1):

The biggest hurdle is embedding AI-native platforms into legacy infrastructures. To unlock AI's full potential, telecom marketers must push for IT investments that streamline integrations with cloud-native CRMs, automated campaign tools, and billing systems (see Figure 4).



Data Integration and Quality (33% and 30% Rank It #1):

AI-native platforms thrive on rich, clean, and unified data. Marketers must break down silos and build a centralized data lake. Imagine merging mobile, broadband, and social media data to power hyper-targeted campaigns for premium 5G plans- turning data into a growth engine.



Security and Privacy Concerns (24% Rank It #1):

Handling sensitive customer data demands AI agents equipped with top-notch encryption, strict compliance with regulations like GDPR, CCPA and country-specific Privacy Acts, and proactive cybersecurity to safeguard trust.



Lack of Skilled Personnel (21% Rank It #1):

AI-native platforms demand expertise in data, automation, and advanced analytics—skills often beyond marketing's traditional scope. The talent gap challenges marketers to upskill teams or bring in specialists, from optimizing campaigns to perfecting pricing strategies.

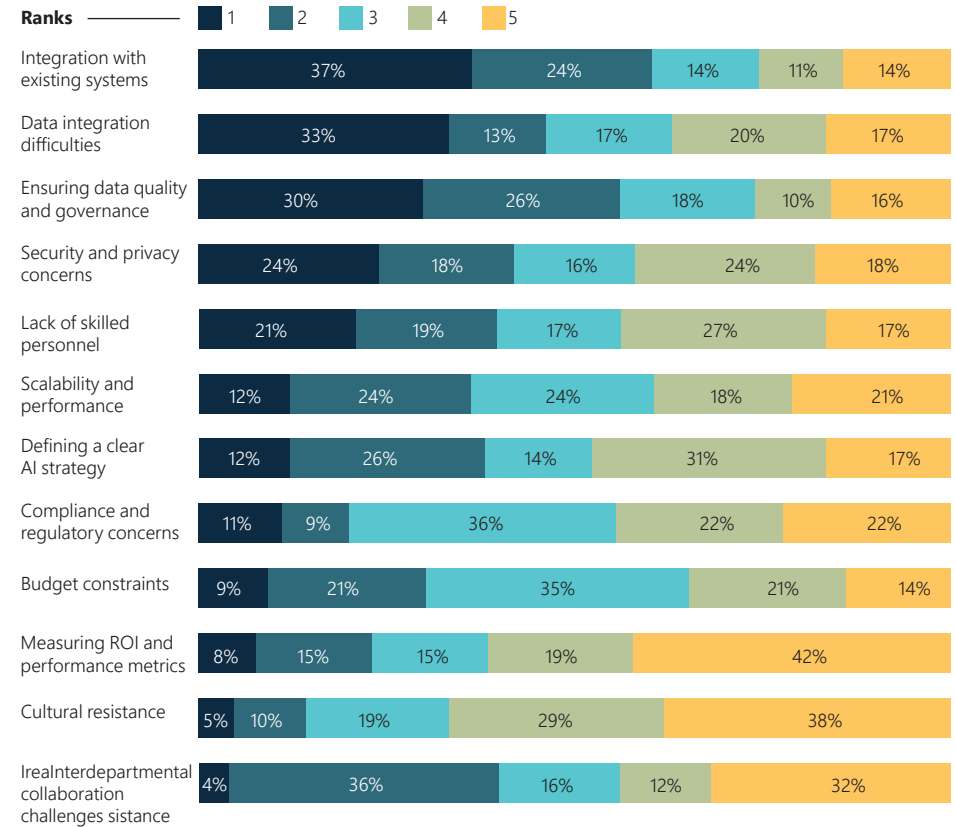
Mastering Transformation: A Strategic Blend



Figure 4

The transition demands a strategic blend of technical, organizational, and cultural transformation

What are the biggest challenges your company faces or expects when integrating AI-native marketing platforms into your tech stack?



“Data integration has been a tough nut to crack, especially with GDPR making cross-market insights a challenge. We’ve invested heavily in a unified data layer to bridge the gap. The real hurdle is finding talent who truly understand both AI and customer engagement.”

Head-Marketing; A mid-size telecom player in Europe

SPARK: The Blueprint for AI-Native Marketing Mastery

Based on survey insights, we've developed the SPARK Framework- a bold, five-step guide to help marketing leaders maximize ROI and thrive in this era of intelligent marketing:

- S**EAMLESS INTEGRATION: Break down silos and unify data ecosystems. Forget legacy bottlenecks—AI-native platforms thrive on free-flowing, real-time data, delivering flawless performance and instant decisions.
- P**ERSONALIZED CUSTOMER JOURNEYS: Turn AI agents into your ultimate marketing team, crafting hyper-relevant, real-time messaging. From campaign optimization to lifetime value boosters, AI agents ensure every interaction drives results.
- A**GILE SECURITY: Build trust with transparency and ethics. Protect customer data like gold—because trust is the ultimate currency in AI-first marketing.
- R**EVOLUTIONIZED TALENT: Upskill for the future of human-AI collaboration. Equip your teams to innovate boldly alongside AI, transforming them from operators to trailblazers.
- K**EY PARTNERSHIPS: Collaborate for scalable success. Partner with future-ready vendors who drive innovation, ensuring your AI journey evolves with the tech.

With SPARK, you're not just adopting AI—you're mastering it.

Seamless Integration: Laying the Foundation for Success

Integrating AI-native platforms isn't just a tech upgrade—it's the backbone of next-level customer engagement, marketing efficiency, and ROI (see Figure 5). Here's how telecom marketers are leading the charge:



Building the Brain: Implementing a Unified Data Layer (72%).

Telecom marketers are transforming siloed data—browsing habits, app usage, and more—into unified ecosystems. This fuels hyper-personalized experiences like predictive billing alerts, real-time offers, and autonomous network tweaks during peak hours, driving seamless customer satisfaction.



Breaking Free: Upgrading Legacy Systems (66%).

Outdated infrastructure slows progress. Upgrading legacy systems ensures smooth AI integration, enabling faster deployment of features like AI-powered customer support and real-time tariff adjustments.



Winning Trust: Strengthening Data Governance and Security Frameworks (64%).

With growing regulatory demands, robust data security and compliance frameworks are essential. These measures pave the way for trust-driven innovations like privacy-first targeting and advanced fraud detection.

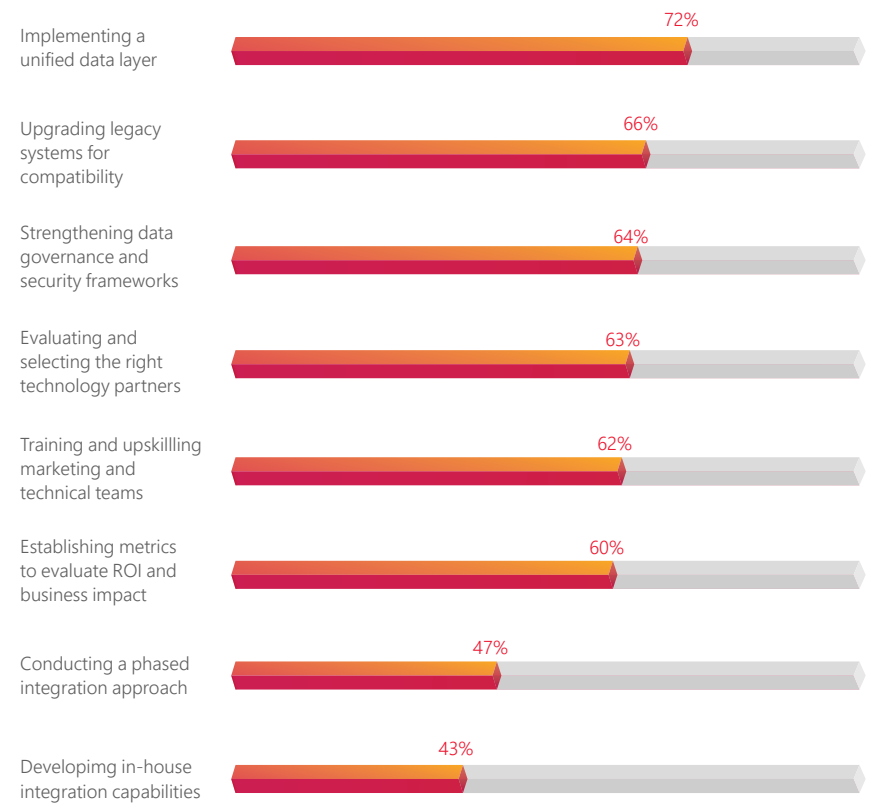
"Legacy systems may have brought us here, but they won't take us forward. AI-native platforms demand a seamless foundation—one that unifies data and ensures scalability. Integration is where the future of telecom marketing begins," VP-Marketing; A Telecom Player in APAC

Figure 5

From Legacy to AI-Driven: How Marketers are Preparing for Seamless Platform Integration

Integrating AI-native platforms isn't just a tech upgrade—it's the backbone of next-level customer engagement, marketing efficiency, and ROI (see Figure 5). Here's how telecom marketers are leading the charge:

What steps is your organization planning to take to prepare for integrating AI-native marketing platforms?



Personalized Customer Journeys: AI Agents Powering Real-Time, Hyper-Relevant Experiences

AI-native platforms go beyond automation—they transform how marketers design smarter, faster, and more connected customer journeys (see Figure 6). Here’s how AI supercharges every stage:



Retention (78%): Keeping Customers and delighting them. AI detects reduced usage and offers personalized rewards or upgrades, ensuring proactive retention before customers notice their needs.



Purchase (71%): Predicting Wants, Removing Friction. AI anticipates needs, suggesting festive premium packages and auto-launching personalized upgrades boosting sales with no manual effort.



Advocacy (60%): Turning Customers into Brand Advocates. AI automates referrals, identifies power users, and encourages sharing, expanding brand reach through authentic advocacy.

The Speed Advantage: Cutting Campaign Execution Time by 50%

The survey shows 61% believe AI-native platforms cut campaign time by half. Faster rollouts help marketers quickly respond to trends and competition.



Personalization at Lightning Speed. With 34% prioritizing personalization, AI turns data into action, delivering hyper relevant messages instantly outpacing traditional marketing speeds.



Outpacing the Competition with Automation. With 27% prioritizing speed, AI automates tasks like testing, segmentation, and logistics, enabling real-time campaign execution and adaptation for a competitive edge.



Real-Time Insights for Instant Decisions. For 18%, real-time insights matter most. AI tracks performance, adjusts campaigns instantly, and predicts demand, enabling rapid, tailored offers during peak seasons.



Figure 3

AI's Impact Across the Customer Journey: From Awareness to Advocacy

Which stages of the customer journey do you believe AI-native Platforms can influence the most

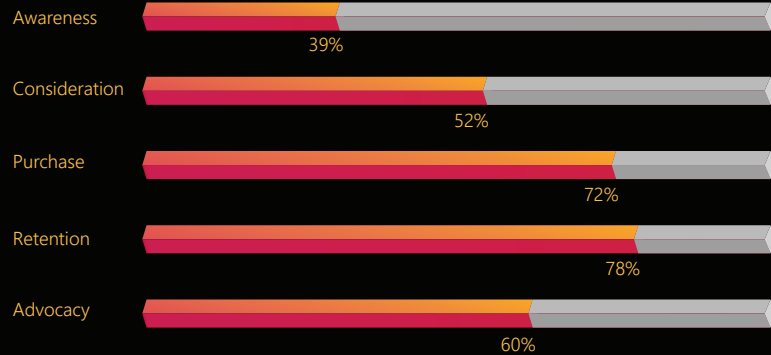
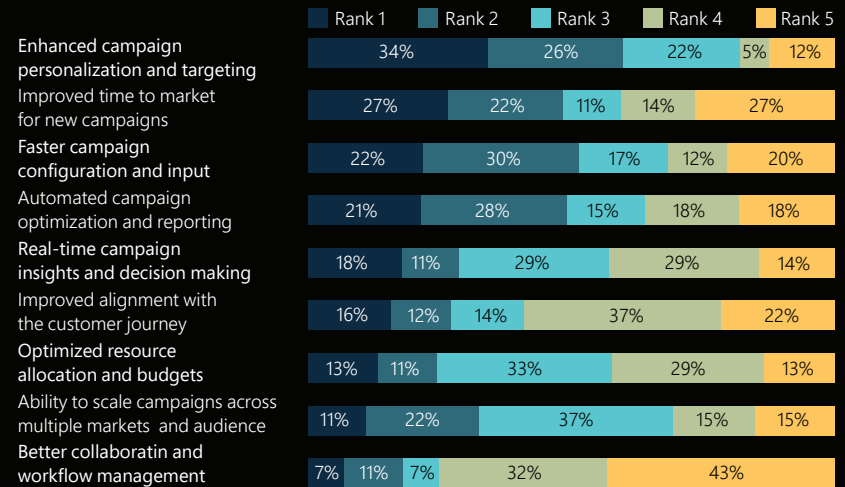


Figure 7

How AI-Native Platforms are Reshaping Campaigns with Speed and Precision

How do you anticipate AI-native platforms will enhance your campaign operations



61% — Respondents expect AI-native platforms to reduce the time required for campaign execution by 50% or more

Agile Security: Building Trust in an AI-Driven World

While AI-native platforms deliver hyper-personalization and operational speed, they also bring unique challenges in data security and ethical AI usage:



Data Breaches Top the List (71%).

Launching a hyper-personalized campaign with AI analyzing data in real time can expose vulnerabilities. A single breach could damage trust and lead to penalties. The solution? Strong encryption, regular audits, and AI vendors committed to "security by design."



Unethical Use of Personal Data (67%).

AI insights are powerful but must be used responsibly. If AI predicts churn and sends retention offers, lack of transparency may feel manipulative. Clear consent policies and ethical AI practices turn data use into a trust-building opportunity, not a risk.



Tackling the "Black Box" Problem (65%).

AI's lack of transparency makes it hard for marketers to justify decisions, causing friction with leadership and regulators. While interest in explainable AI (XAI) is growing, interpretability remains a challenge. Until then, balancing AI insights with human oversight is key to building trust.

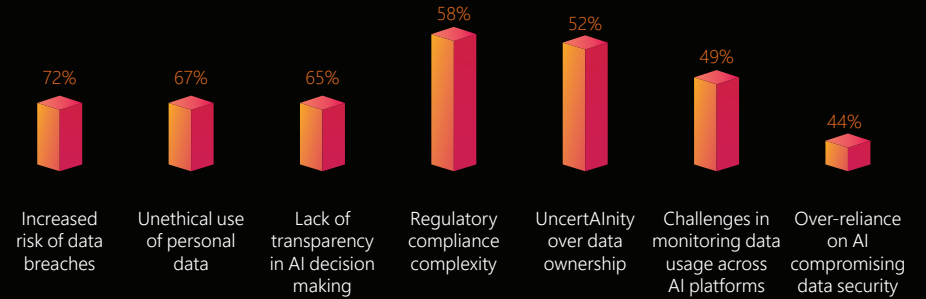
"Marketers need to understand the 'why' behind AI decisions to use them effectively. If a platform recommends prioritizing an audience, we need to know the logic. Better explainability tools would make these platforms more compelling."

-CMO, leading US telecom company

Figure 8

Building Trust in AI-Native Systems

What security and privacy concerns do you anticipate with AI-native platforms?



Revolutionize Talent: Preparing Teams for Human-Machine Collaboration



Revolutionize Talent: Preparing Teams for Human-Machine Collaboration

With AI-native platforms, it's not about working harder; it's about working smarter with AI as your trusted ally. Here's how marketers can succeed:



Augmenting Human Capabilities with AI-Driven Insights.

68% of respondents believe AI enhances decision-making by uncovering insights humans might miss (see Figure 9). Think of AI as a co-pilot, analyzing vast data to reveal hidden opportunities and trends. This empowers marketers to make smarter, faster, and more confident decisions.



Shifting Focus to Strategic Planning and Creative Problem Solving.

With 65% of marketing roles shifting to strategy and creativity and 57% of tasks automated, marketers gain new freedom to innovate. AI can manage loyalty programs, analyze behavior, and send targeted rewards in real time, enabling teams to focus on bold, long-term engagement strategies.



Upskilling to Manage and Interpret AI-Driven Processes.

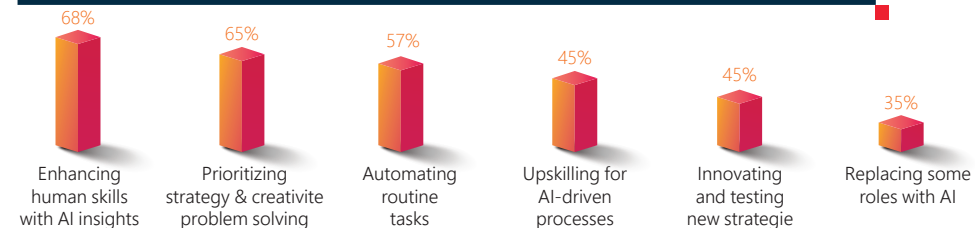
With 45% of respondents emphasizing upskilling, training marketers in AI analytics and data storytelling is key. Skilled teams can interpret AI insights and adjust campaigns in real time, unlocking new opportunities and driving better results.

"AI elevates marketers by handling repetitive tasks, freeing them for strategy and creativity. AI is the engine, but human creativity fuels it."
— Head of Marketing, European telecom company

Figure 9

The Future of Work: Human + Machine Collaboration

How do you think the adoption of AI-native Marketing Platforms will reshape the role of human marketers?



Key Partnerships: Collaborate to Innovate

With 44% of respondents eager to explore new vendors and another 28% open to change if their needs remain unmet (see Figure 10), the hunger for innovation has never been greater. Telecom marketers are no longer satisfied with cookie-cutter solutions—they demand partnerships that deliver tailored, cutting-edge AI capabilities to drive tangible results.

Technology vendors now face heightened expectations, with telecom marketers raising the bar for what true collaboration means (see Figure 11). The most critical requirements for vendors are:



Outcome-Based Results (83%):

Gone are the days of vague promises. Every solution must deliver measurable ROI—whether it's boosting ARPU, enhancing customer retention, or streamlining operations. Vendors that clearly tie their offerings to bottom-line impact will gain a competitive edge.



Proactive AI Use Case Recommendations (79%):

Marketers want more than technology—they want strategic guidance. Vendors must proactively deliver actionable AI-driven use cases that improve campaign performance in real time.



Transparency & Ethics (76%/65%):

Trust is crucial in telecom. Vendors must prioritize transparent, ethical, and explainable AI. While performance may trade off with interpretability, responsible AI builds confidence and long-term partnerships.

"We don't just need technology providers; we need visionary partners who challenge us to innovate, guide us with actionable insights, and help us unlock the true potential of AI. For that, we're ready to switch to keep up with the pace of technological development," CMO, a large US telecom player

Figure 10

Evolving Needs, Partnerships: The Shift in Vendor Dynamics

How likely are you to consider new vendors to address the evolving demands of AI-native MarTech?

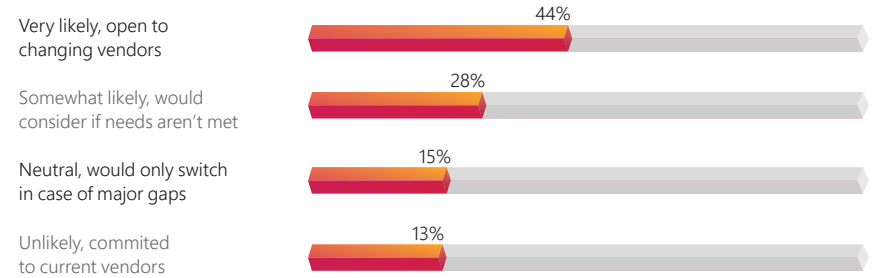
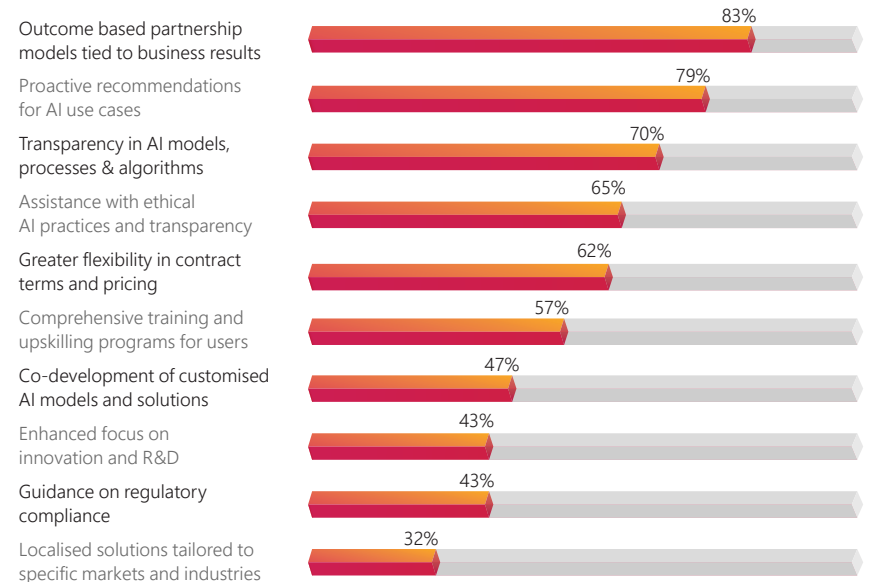


Figure 11

Rethinking Vendor Relationships

As AI-native MarTech platforms continue to evolve, what support do you anticipate needing from vendors?



AI-Native Platforms: Courage to Transform, Strategy to Dominate

AI-native platforms are the revolution telecom marketers have been waiting for. This is your opportunity to redefine customer engagement, obliterate inefficiencies, and set the gold standard for innovation. The challenges—outdated systems, data privacy concerns, and the need for talent transformation—are real, but so is the potential for extraordinary rewards.

The SPARK Framework is your ultimate guide to equip you not only to embrace AI-native platforms but also to lead with them. It's more than just adoption; it's about achieving breakthrough results and creating lasting impact.

The future isn't knocking—it's already here. Lead with courage. Strategize with clarity. And transform with confidence. Telecom's AI revolution is unfolding, and the marketers who seize it today will shape tomorrow. Are you ready to lead the charge? The time to act is now.

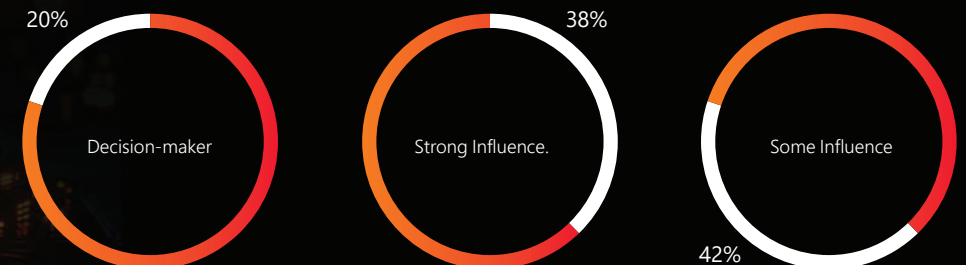
Methodology and Demographics

Comviva commissioned Curious Insights, an independent global market research firm, to conduct an online panel survey of 100 senior marketing executives at telecom companies worldwide. In addition, three qualitative interviews were conducted to get first-hand feedback from companies using or planning to use AI-native platforms.

Which of the following most closely describes your job level?



By Degree of Influence over marketing technology investments



About Comviva's Research Centre

Comviva's Research Centre examines current and future trends that will shape the future of the telecom industry.

The Centre provides thought-provoking research and analysis of business and technology trends and dynamics, and collaborates with a wide range of business, technology, and academic thinkers regarding what the future of telecom will look like as technology changes every aspect of the industry. For more information, visit: www.comviva.com



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