



Mind the Gap: Monetizing B2B Services in the AI Era

Survey Highlights and Analysis

Author: Jim Hodges

July 2026

In partnership with:



This Omdia White Paper was commissioned by Netcracker.

Contents

Introduction	3
Executive key findings	3
Detailed key findings	4
Survey background	5
Survey demographics	6
Survey results	7
B2B: Services and strategies	7
B2B barriers	9
B2B strategic goals and operational capabilities alignment	12
Monetizing the B2B ecosystem	14
AI to the rescue?	16
B2B service launch and delivery priorities	20
Appendix	23
Methodology	23
Netcracker’s approach to accelerate B2B growth	24

This Omdia White Paper was commissioned by Netcracker.



Introduction

This report presents the results of Omdia's *Mind the Gap: Monetizing B2B Services in the AI Era* global survey.

The survey was designed to document the following:

- Service provider (SP) business-to-business (B2B) monetization strategies
- Service introduction timelines
- Operational and business challenges
- Ecosystem partner program optimization
- The impact of artificial intelligence (AI)

Executive key findings

- **93% of SP executives believe that increasing B2B services revenue is crucial to continued market success.**
- **Despite this, 80% of the survey respondents agree that launching new B2B services is challenging.**
- **This sentiment is unquestionably related to the fact that SP executives feel that operational complexity, process fragmentation, and data silos are stunting B2B service revenue growth.**

This Omdia White Paper was commissioned by Netcracker.

- As a result, **most SPs (60%) have not achieved alignment between their strategic B2B service delivery goals and operational capabilities.** The largest respondent group (50%) has well-defined strategic goals but lacks the necessary operational capabilities to support them.
- **This lack of alignment adversely impacts B2B service introduction.** More than half of respondent companies (52%) face a minimum one-year service introduction window, which limits revenue growth opportunities.
- **8 out of 10 survey respondents think AI will play a foundational role in enhancing and simplifying B2B service launch** and helping to mitigate these challenges. The top three areas where they expect AI to make a difference are improving customer experience, monitoring and enhancing B2B service quality, and reducing B2B service launch timeframes.
- **AI implementation priorities are to integrate AI into current platforms and processes, invest in cloud native operations/business support systems (OSS/BSS), and collapse data silos.**

Detailed key findings

- **SPs believe that future B2B growth and revenue will be driven by a range of services.** Based on “extremely important” responses, network as a service (NaaS) and anything as a service (XaaS) attained the highest scores (51% and 50%, respectively).
- **SPs are facing numerous competitive and bundling barriers.** The two that stand out based on “greatest barrier” input are difficulty bundling B2B services with connectivity (31%) and competitive pricing challenges (30%).
- **Formidable operational challenges also exist.** Managing and updating order management (28%) and billing systems (26%) were perceived as the “biggest challenges.” These operational challenges are linked to **SPs’ belief that they rely too heavily on manual workflows and disparate systems.**
- More than half (55%) also agree that **data silos are negatively impacting their ability to generate deeper company insights** (and perhaps most importantly, **are negatively impacting their ability to automate network operations**).

This Omdia White Paper was commissioned by Netcracker.

- **SPs are banking on AI to help them productively navigate a matrix of platform, operations, and partner challenges.** 8 out of 10 survey respondents expect AI/automation to have either a major or moderate impact on helping them mitigate B2B challenges within the next 24 months.
- **The largest survey respondent group (29%) selected faster resolution of customer/partner support issues** as their number one AI capabilities deployment priority.
- **Given the perceived benefits, SPs are following an aggressive AI commercial integration path.** 89% of SPs either already support some level of AI and automation for cloud computing services (44%) or plan to support these same cloud compute services within 12 months (45%).

Survey background

Omdia's *Mind the Gap: Monetizing B2B Services in the AI Era* survey was conducted in April and May 2026. The survey is based on responses from 80 qualified executives who hold director-level or higher roles in their respective SP organizations. The questionnaire was jointly developed by Omdia and project sponsor Netcracker.

Responses are confidential and are only presented in aggregate form. Omdia does not share individual or company names from the survey responses.

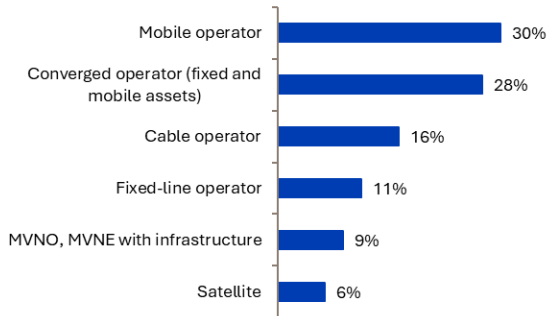
This Omdia White Paper was commissioned by Netcracker.

Survey demographics

Figure 1 provides the survey demographics. These demographics include the type of company, the region, and the annual revenue of the companies where the respondents worked.

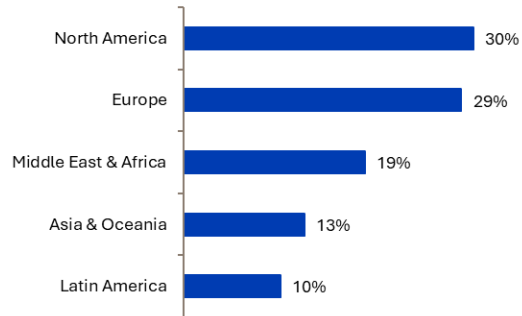
Figure 1: Survey response demographics

What type of service provider do you work for?



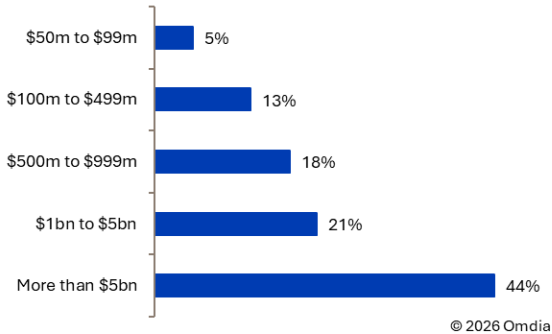
© 2026 Omdia

Where is your company based?



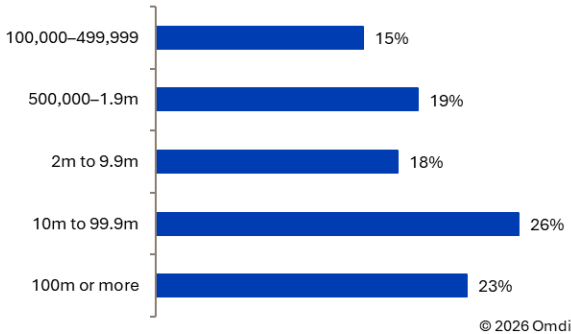
© 2026 Omdia

What is your organization's approximate annual revenue?



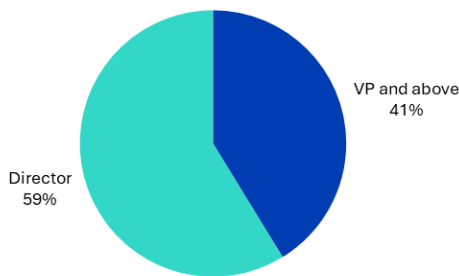
© 2026 Omdia

How many in-country subscribers do you have?



© 2026 Omdia

What level is your position?



© 2026 Omdia

What is your primary job function?



© 2026 Omdia

Notes: Numbers in figures throughout this report may not total 100 due to rounding. (n=80)

Source: Omdia

This Omdia White Paper was commissioned by Netcracker.

Survey results

B2B: Services and strategies

The global adoption of cloud native services has had a profound impact on SPs' B2B services monetization strategies.

To understand the implications, the first step in the survey was to assess the sentiment and weighting of the strategic importance of B2B service revenue, as well as measure confidence levels and document any related challenges they face in increasing service revenue.

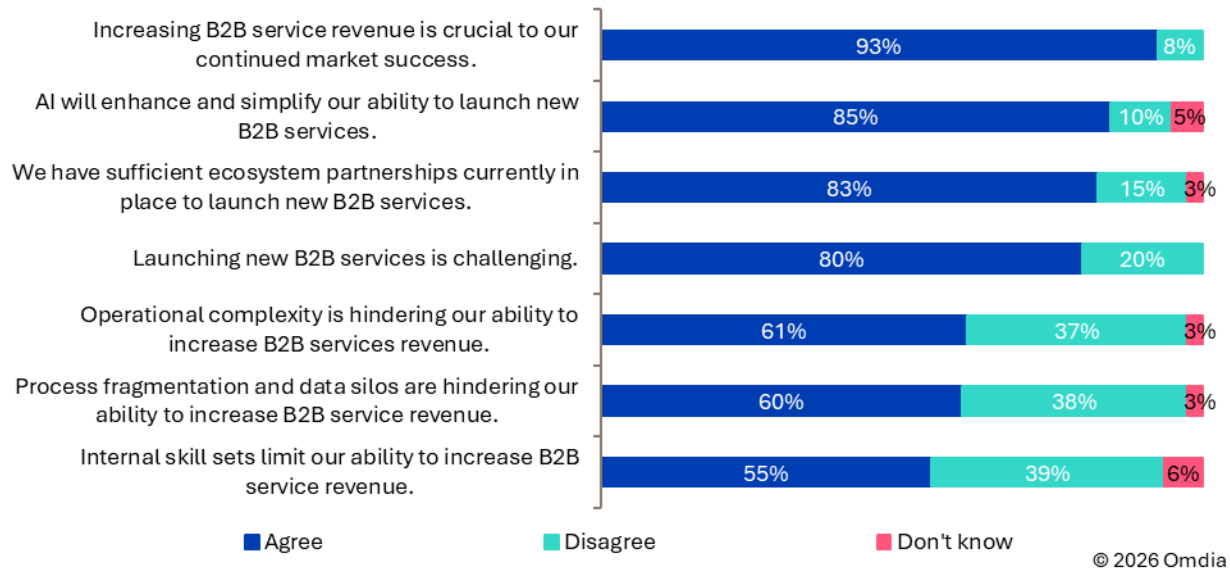
Based on “agree” inputs, **Figure 2** provides definitive proof (93%) that SPs feel increasing B2B services revenue is crucial to continued market success. It also reinforces that AI will play a significant role in enhancing and simplifying B2B service launch (85%).

However, gaps exist that could hinder ambitions for B2B market success. For example, as shown, more than 8 out of 10 SPs (80%) think launching new B2B services is challenging. At least 6 out of 10 SP executives are of the opinion that operational complexity (61%) and process fragmentation and data silos (60%) are stunting B2B service revenue growth.

On the plus side, 83% of SPs think they already have sufficient ecosystem partnerships to launch new B2B services. They are, however, less confident that they have in place the internal skill sets to accomplish revenue growth; 39% feel they do, and 55% feel they do not.

This Omdia White Paper was commissioned by Netcracker.

Figure 2: To what extent do you agree with these statements?



n=80

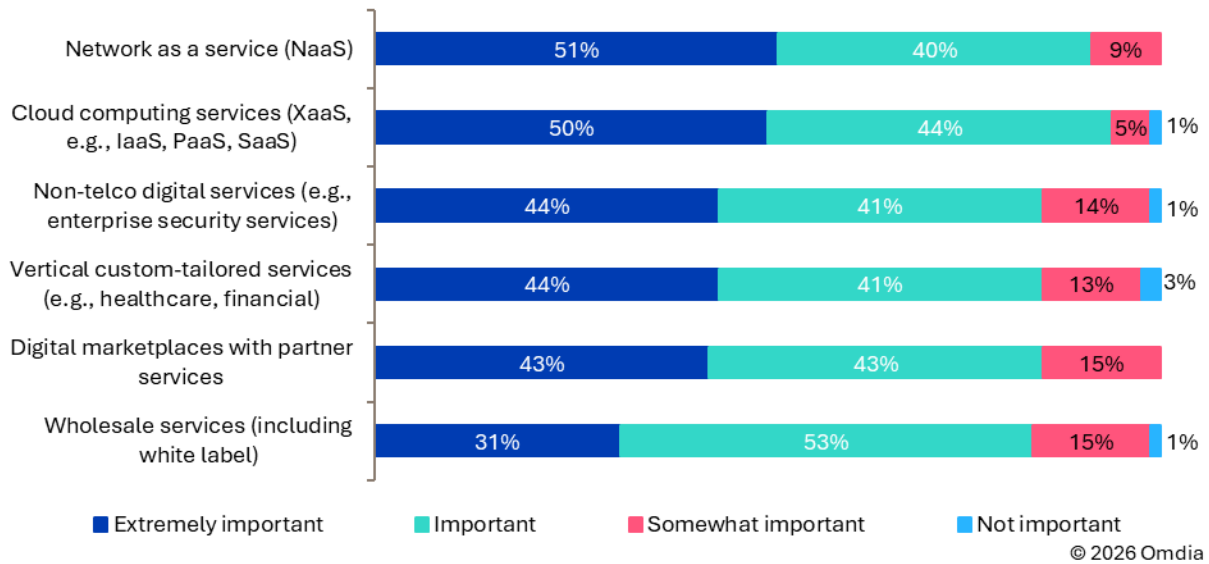
Source: Omdia

A key variable in the revenue growth equation is the mix of B2B service offerings. **Figure 3** documents B2B service priorities. In terms of rankings, based on “extremely important” responses, NaaS and XaaS variants attained the highest scores (51% and 50%), respectively.

Following closely behind were non-telco digital services and vertical custom-tailored services (both 44%), digital marketplace services (43%), and wholesale services (31%). While not unexpected, the responses confirm that SPs’ B2B service strategies must support multiple unique service types that have the potential to increase service delivery complexity (see **Figure 8**).

This Omdia White Paper was commissioned by Netcracker.

Figure 3: How important are the following services to drive future B2B growth and revenue?



n=80

Source: Omdia

B2B barriers

As noted in **Figure 2**, 8 out of 10 SPs align with the view that introducing new B2B services is challenging.

To obtain additional insight, the next question in the survey sought to gauge and rank the weight of the barriers the respondents felt were blocking their attempts to amplify B2B revenue growth.

In this case, as shown in **Table 1**, when asked to rank five barriers, the top one and two ranked “greatest barrier” responses related to difficulty bundling B2B services with connectivity (31%) and competitive pricing challenges (30%).

Difficulty bundling B2B services with connectivity is linked to the **Figure 2** input that captures that data silos and limited platform capabilities are barriers to increasing B2B service revenue. In other words, many of the B2B service delivery challenges SPs face can be traced to the limited capabilities of their OSS/BSS.

This Omdia White Paper was commissioned by Netcracker.

Table 1: Rank the following barriers to growing B2B services (Rank in order where 1 = greatest barrier)

Barrier	“Greatest barrier” Rank 1 responses (%)
Difficulty bundling B2B services with connectivity	31%
Competitive pricing challenges	30%
Slow time-to-market	16%
Competition from webscalers/others	14%
Limited staffing to fully pursue B2B opportunities	9%

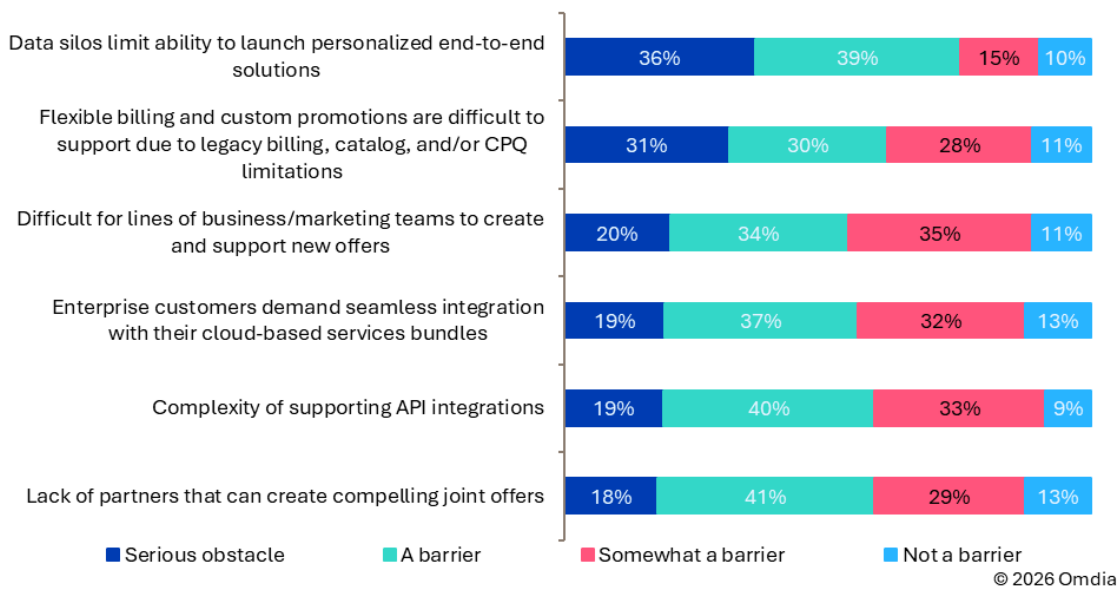
n=80

Source: Omdia

The next question investigated B2B service barriers in greater detail. The results illustrated in **Figure 4** confirm that serious platform-related barriers exist. The two that stand out here are the impact of data silos (36%) and legacy billing, catalog, and configure, price, and quote (CPQ) limitations (31%).

Based on this input, there is little doubt that SPs think that aging and limited OSS/BSS platforms are seriously impacting their ability to launch B2B services.

Figure 4: To what extent are the following barriers to launching new B2B services?



n=80

Source: Omdia

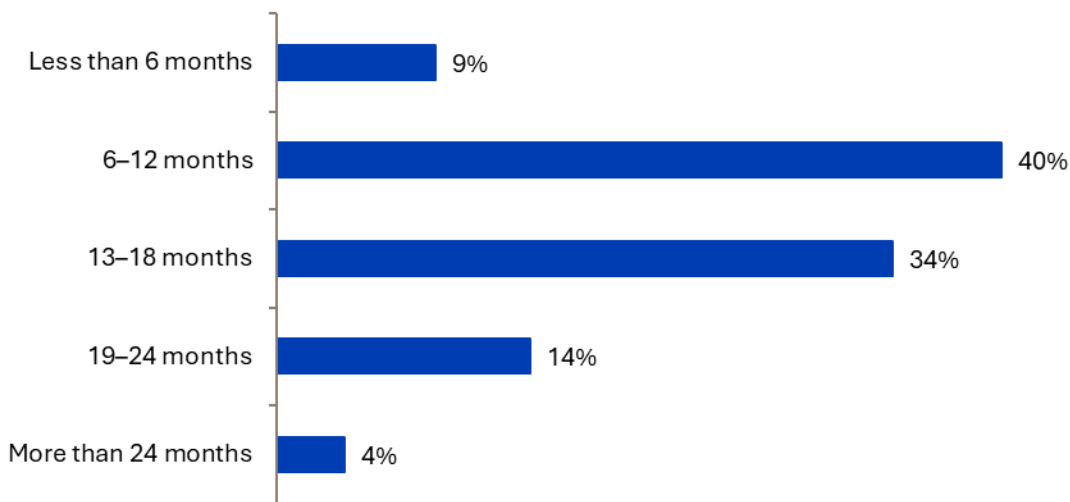
This Omdia White Paper was commissioned by Netcracker.

In addition to documenting B2B service and segment preferences, the survey also tackled service delivery timelines. As shown in **Figure 5**, the largest *single* cohort of survey respondents (40%) felt service introduction could be accomplished within 6–12 months.

Unfortunately, an even greater number of respondents see the timeline as considerably longer, with 34% estimating 13–18 months and 14% saying 19–24 months.

Factoring in the 4% from the “more than 24 months” group and a longer window translates to more than half of respondents (52% = 34% + 14% + 4%) needing a launch window of greater than one year, which clearly dampens opportunities to realize new revenue streams in a timely manner. Omdia attributes these extended timelines to the OSS/BSS platform deficiencies previously noted.

Figure 5: What is the average time needed to launch a new B2B service?



© 2026 Omdia

n=80

Source: Omdia

This Omdia White Paper was commissioned by Netcracker.

B2B strategic goals and operational capabilities alignment

Operational readiness is a crucial consideration for B2B service launches. Before launching any new service, SPs must assess overall readiness by auditing their operational capabilities to ensure they can address any challenges before any new service is launched in a commercial environment.

As shown in **Table 2**, when asked to rank four operational challenges based on “biggest challenge” Rank 1 responses, managing and updating order management (28%) and billing systems (26%) were perceived to be the greatest challenges.

The conclusion is clear. Database inflexibility represents a major operational challenge for B2B services.

Table 2: Rank the operational challenges as they relate to B2B service launch (Rank in order, where 1 = biggest challenge)

Operational challenge	“Biggest challenge” Rank1 responses (%)
Managing and updating order management databases (includes the need to support manual order entry as necessary)	28%
Managing and updating billing systems required to support new services	26%
Managing and updating the CPQ databases	17%
Managing and updating the B2B product catalog databases	9%

n=80

Source: Omdia

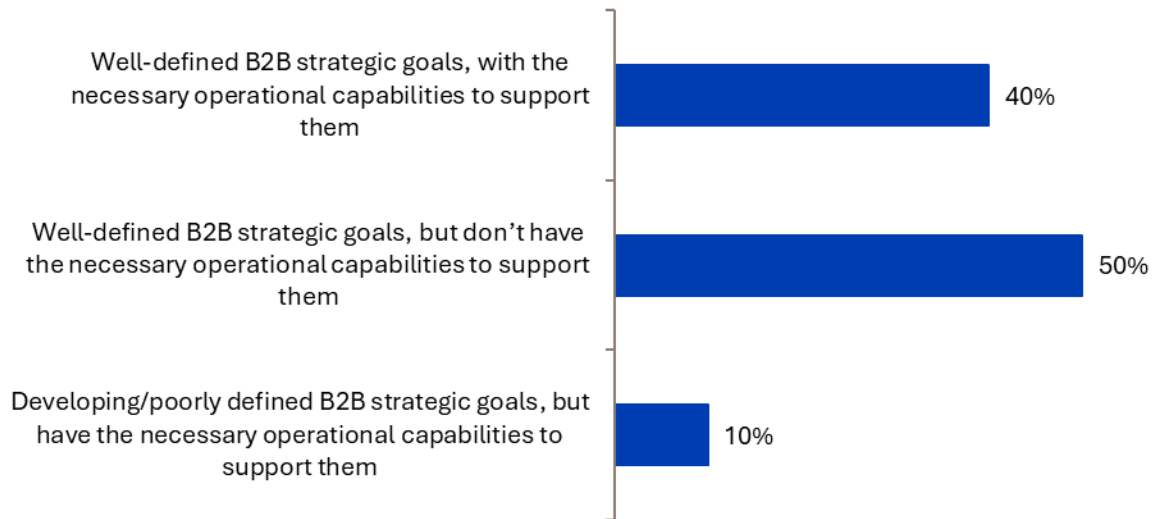
To successfully mitigate the impact of these operational challenges in B2B service launches, SPs must ensure their strategic priorities align with their operational capabilities.

In principle, since B2B services rank as a high priority to increase revenue, most SPs should already have achieved alignment. In practice, based on **Figure 6** input, this is not the case for most SPs. Currently, only 40% of SPs feel they have well-defined strategic goals paired with the necessary operational capabilities to support them.

The largest respondent group (50%) has well-defined B2B strategic goals but lacks the necessary operational capabilities to support them. Omdia believes that current OSS/BSS platform limitations are a major factor in the limited operational capabilities assessment of these operators.

This Omdia White Paper was commissioned by Netcracker.

Figure 6: Which best describes the alignment between your B2B strategic goals and your operational capabilities?



© 2026 Omdia

n=80

Source: Omdia

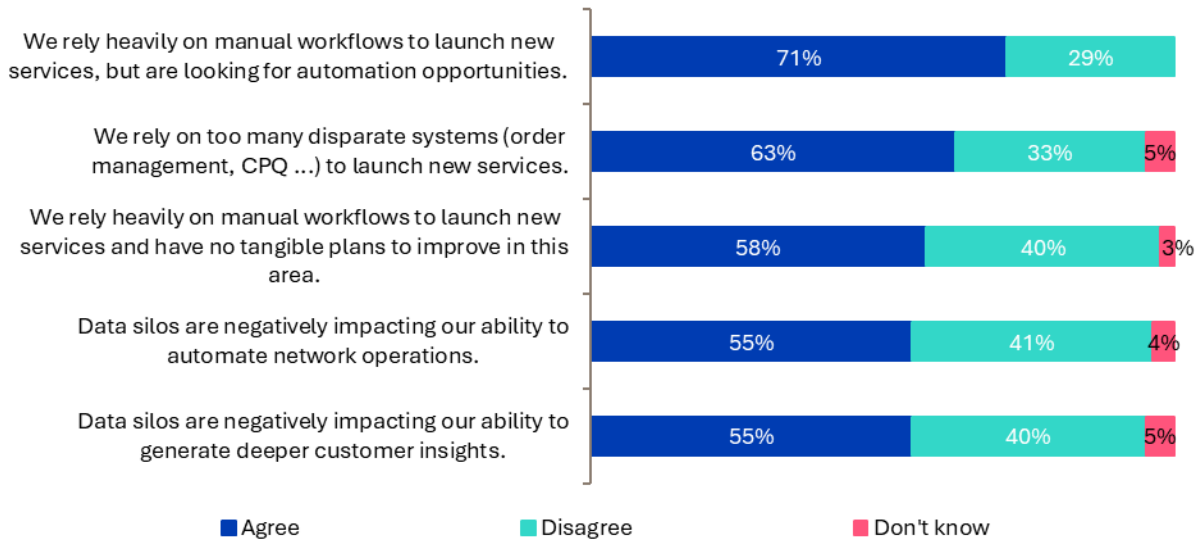
The next question (**Figure 7**) reinforces the operational and related platform challenges that SPs are facing.

At the heart of the survey data is a series of agree/disagree statements that indicate most SPs feel that they rely too heavily on manual workflows (71%), as well as relying on too many disparate systems (63%) and manual workflows (58%), with no tangible improvement plans.

55% of respondents further agree that data silos are negatively impacting their ability to generate deeper company insights and, perhaps most importantly, are impeding their ability to automate network operations.

This Omdia White Paper was commissioned by Netcracker.

Figure 7: Do you agree or disagree with the following statements?



© 2026 Omdia

n=80

Source: Omdia

Monetizing the B2B ecosystem

Monetizing ecosystem partnerships can be a tricky business for any service. B2B services arguably amplify the complexity curve due to their complex business and partnership requirements.

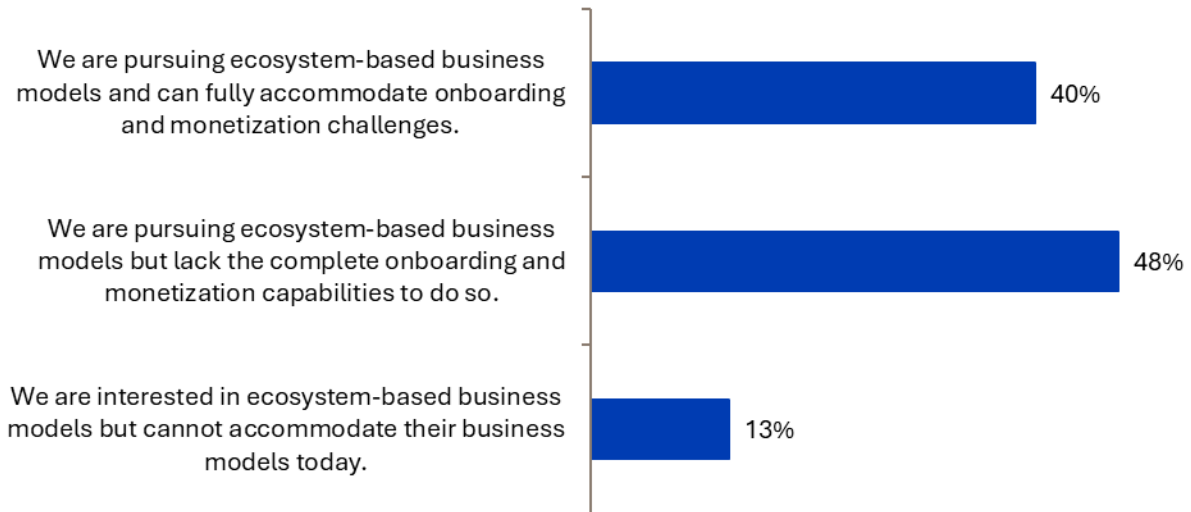
Figure 8 confirms that gaps exist in SPs’ plans to monetize partner/ecosystem-based business models. As shown, only 40% of survey respondents are pursuing these business models and can fully accommodate the related onboarding and monetization challenges.

In contrast, 48% are interested in taking advantage of the ecosystem opportunity but lack the necessary onboarding and monetization capabilities, while another 13% are not even in a position to pursue these business models today. This means that 61% (48% + 13%) of SPs face a significant level of impairment.

Omdia interprets this data as reinforcing the SP conundrum. While SPs want to monetize their business models, the majority still lack the data management and operational capabilities to do so.

This Omdia White Paper was commissioned by Netcracker.

Figure 8: Which statement best describes your commitment to support and monetize partner/ecosystem-based business models and meet their business requirements?



© 2026 Omdia

n=80

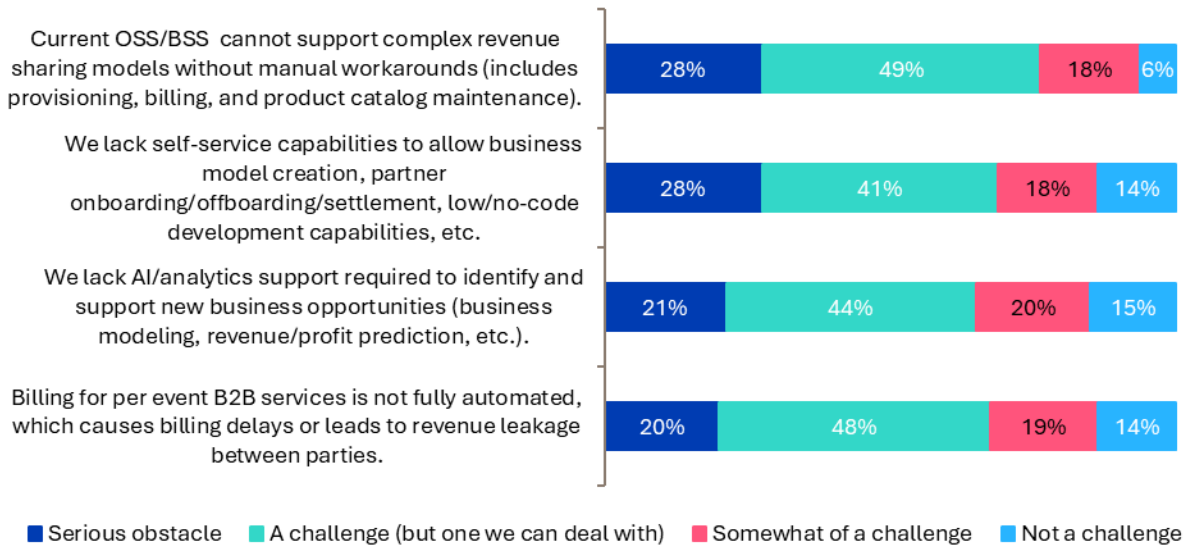
Source: Omdia

Another pivotal B2B monetization consideration is the ability to manage working relationships and revenue sharing with third-party partners. SPs face OSS/BSS platform challenges in this realm, as well.

The range of “serious obstacles” illustrated in **Figure 9** include the inability of OSS/BSS to support complex revenue sharing without manual workarounds (28%), lack of self-service onboarding to allow business model creation (28%), lack of AI/analytics support to identify new business opportunities (21%), and lack of automated billing for per event B2B services (20%).

This Omdia White Paper was commissioned by Netcracker.

Figure 9: How significant are the following challenges to sharing service revenue with third parties?



© 2026 Omdia

n=80

Source: Omdia

AI to the rescue?

Within the telecom industry, a general view now holds that AI, particularly agentic AI, will enhance network performance and customer outcomes and ultimately enable new service revenue. That sentiment was front and center in this research.

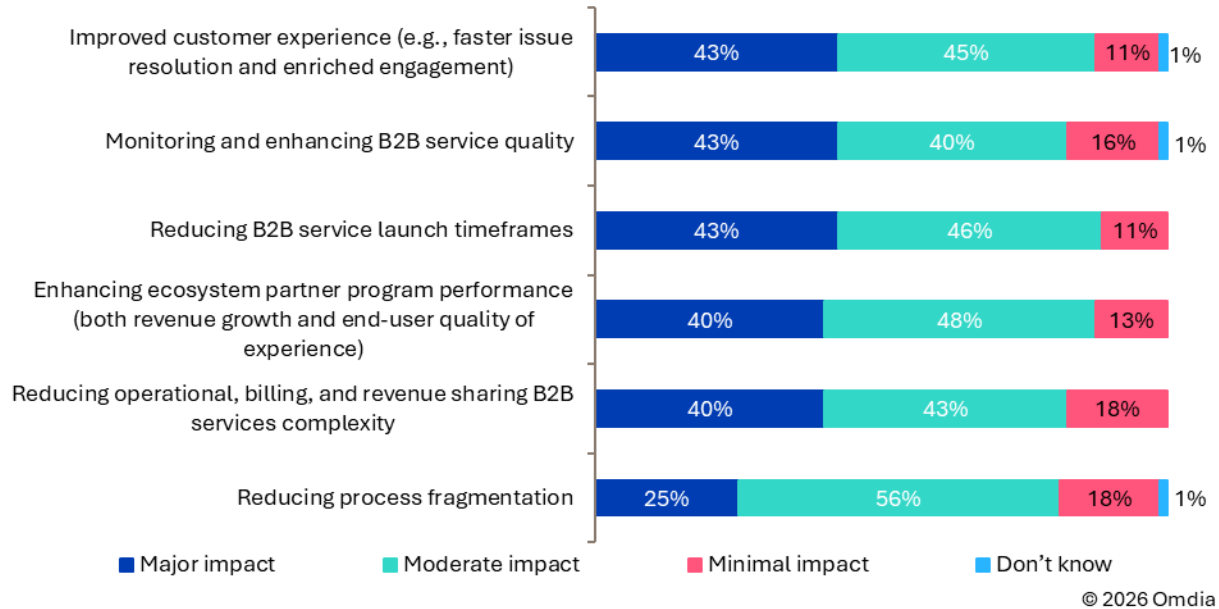
As shown in **Figure 10**, most survey respondents anticipate that AI/automation will have either a “major” or “moderate” impact on helping them mitigate B2B challenges within the next 24 months. This data is consistent with **Figure 2** responses (85% agree that AI will enhance and simplify B2B service launch).

Based on “major impact” input, the top three areas of improvement are related to improving customer experience, monitoring and enhancing B2B service quality, and reducing B2B service launch timeframes (all 43%). Not far behind are the SPs that feel AI/automation will have a “major impact” on enhancing ecosystem partner program performance or reducing B2B billing and revenue sharing complexity (both 40%).

Overall, based on the aggregate value of both “major impact” and “moderate impact” input, a *minimum* of 81% of SPs (based on the lowest ranked reducing process fragmentation: “major impact” = 25% + “moderate impact” = 56%) think AI/automation will be impactful in addressing B2B challenges.

This Omdia White Paper was commissioned by Netcracker.

Figure 10: Within the next 24 months, how significant an impact will AI/automation have on the following B2B challenges?



n=80

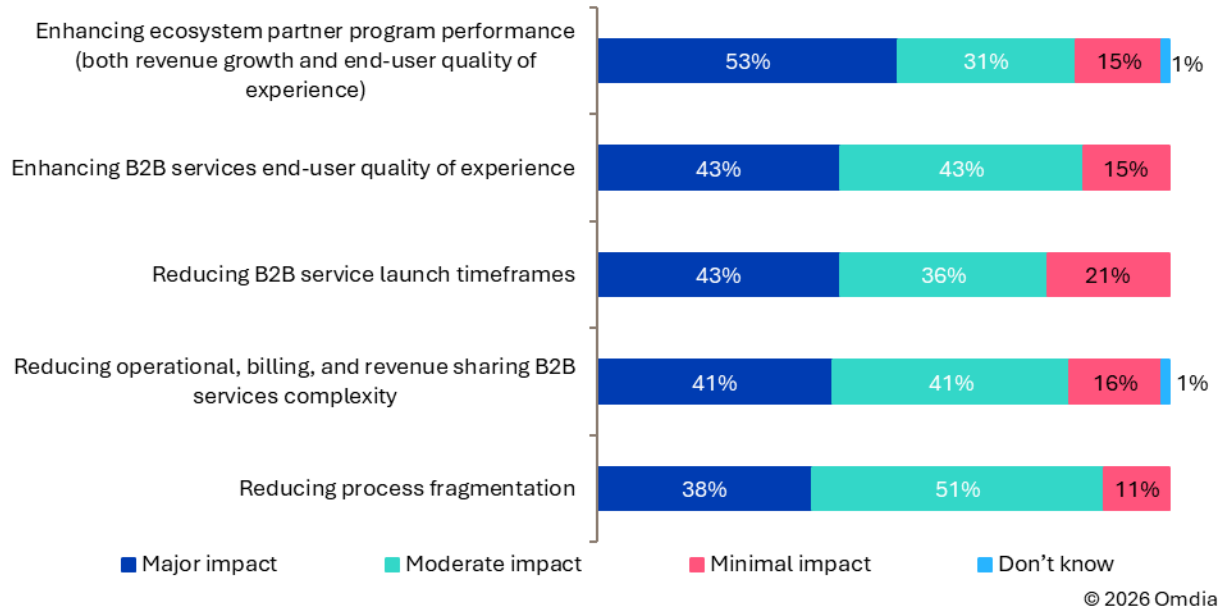
Source: Omdia

The rollout of AI/automation will take time. In theory, this knowledge should result in SPs expecting AI to have an even greater impact on mitigating B2B challenges in the future.

When Omdia asked the same question utilizing a greater than 24-month window, the above premise was confirmed. For example, in **Figure 10**, the “major impact” input for the current timeline (within the next 24 months) ranged from 25% to 43%. In contrast, as shown in **Figure 11**, the “major impact” ranges for timelines beyond 24 months jump to 38% for the lowest ranked (process fragmentation) to 53% for the highest ranked (enhancing ecosystem partner program performance).

This Omdia White Paper was commissioned by Netcracker.

Figure 11: Beyond 24 months, how significant an impact will AI/automation have on the following B2B challenges?



n=80

Source: Omdia

Agentic AI systems represent a breakthrough in the autonomous network journey because they support highly intelligent software agents that transcend the pattern-matching capabilities supported by machine learning. This superior level of intelligence allows agentic AI systems to make real-time decisions and enforce policies with zero or minimal “humans in the loop.”

AI agents, therefore, have the potential to add value on many levels. These range from network performance to enhancing customer outcomes.

This Omdia White Paper was commissioned by Netcracker.

The next survey question drilled down a little deeper, investigating customer impacts by asking respondents to rank (1 to 5) customer issues and delivery considerations. While SPs are assuming a wide value lens for AI agents, as captured in **Table 3**, faster resolution of customer/partner support issues stands out based on achieving 29% of the Rank 1 inputs.

Omdia sees clear OSS/BSS implications in play here, reinforcing the view that manual processes and data silos limit customer interactions and B2B service delivery (see **Figure 7**).

Table 3: Rank in order of priority the following capabilities for your AI agent deployment (Rank in order where 1 = highest priority)

AI agent priorities	Rank 1 highest priority responses (%)
Faster resolution of customer/partner support issues	29%
Increase in upsell opportunities	19%
Increase in customer conversions (opportunity to order)	18%
Reduced customer churn	15%
Faster customer activation	14%
Improved SLA conformance	6%

n=80

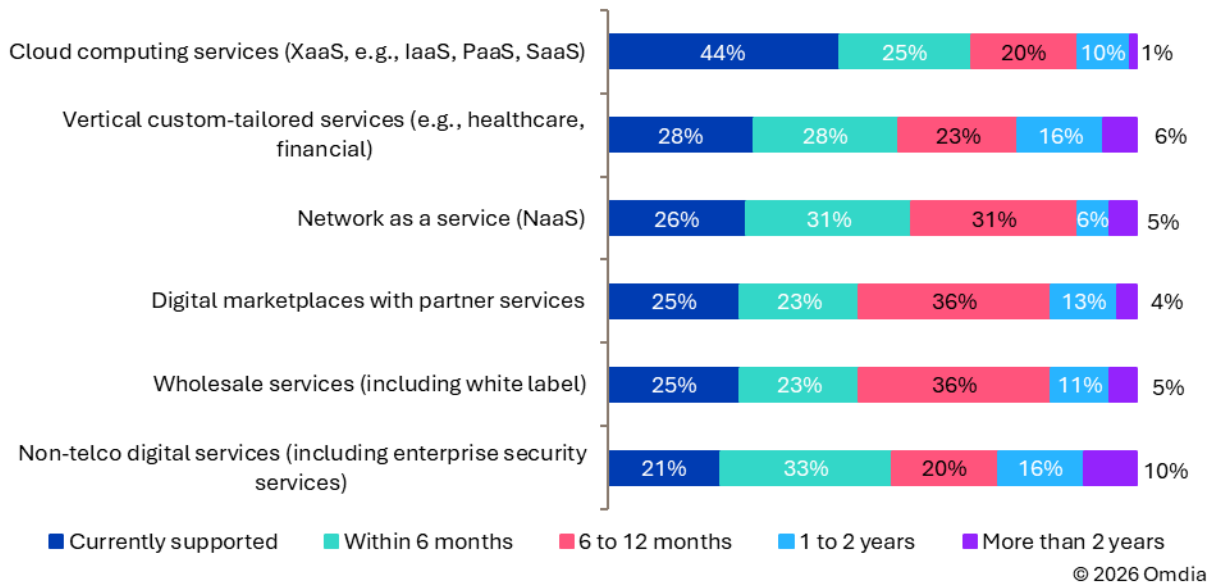
Source: Omdia

The survey data leaves little room for doubt that SPs are “all in” committed to implementing AI. The main question here, then, is not if, but when; i.e., how long will live network commercial deployments take? **Figure 12** documents the general timeline for specific services.

This Omdia White Paper was commissioned by Netcracker.

As shown in the figure, 44% of SPs already support some level of AI and automation for their cloud computing services, with an additional 45% (25% + 20%) planning to support these same cloud compute services within the next 12 months. These results will cumulatively result in 89% of SPs supporting AI for cloud computing services within a year or less.

Figure 12: When do you expect to utilize AI and automation to support the following capabilities in a commercial environment?



n=80

Source: Omdia

B2B service launch and delivery priorities

The data trends documented in this research confirm SPs are facing numerous B2B service introduction challenges—many of which are OSS/BSS platform-related—and that they plan to heavily rely on AI to help address them.

Definitive success in this area will rely generally on the willingness to invest, take action, and, more precisely, decide where and when to integrate AI into their network.

This Omdia White Paper was commissioned by Netcracker.

The data in **Table 4**, using a 1 to 5 ranking, document the priorities. The top three based on Rank 1 inputs are AI integration into current platforms and processes, which is the highest priority (30%), followed by investment in cloud native OSS/BSS and collapsing data silos (both 23%).

These data points confirm that many B2B service delivery obstacles are tied to data silo-centric OSS/BSS platforms that rely too heavily on manual workarounds. AI will play a key role in mitigating these platform limitations.

Table 4: Which actions will you most prioritize to improve your B2B service launch and delivery capabilities? (Rank in order, where 1 = the highest priority)

Actions	Rank 1 highest priority responses (%)
Integrate AI into current platforms and processes	30%
Invest in cloud native OSS/BSS	23%
Collapse data silos	23%
Commit to ecosystem partner expansion	16%
Invest in hiring new employees with AI and cloud skill sets	9%

n=80

Source: Omdia

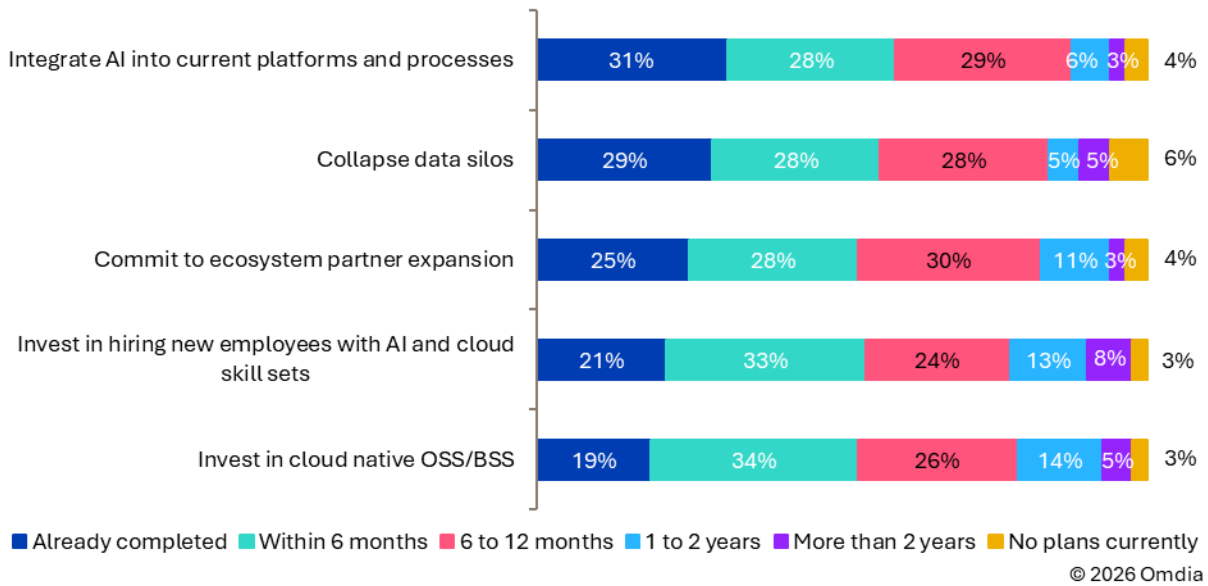
Figure 13 provides additional “where” and “when” insight. The three areas SPs have made the most AI progress based on “already completed” inputs are integrating AI into current platforms and processes (31%), collapsing data silos (29%), and ecosystem partner expansion (25%).

Other notable inputs capture that many survey respondents expect to complete many of the necessary milestones in the next 12 months.

This Omdia White Paper was commissioned by Netcracker.

These include a clear focus on investing in cloud native OSS/BSS capabilities that operators realize are needed to create the agility and flexibility required to support new B2B services. In this case, 60% of respondents (34% within 6 months and 26% within 6–12 months) expect to ramp up their investment in cloud native capabilities within the next 12 months. Omdia considers such investment to be a vital step toward bridging the operational gaps that SPs face in monetizing B2B services in the AI era.

Figure 13: What is the timeline for completing these priorities?



n=80

Source: Omdia

This Omdia White Paper was commissioned by Netcracker.

Appendix

Methodology

This report and its findings are based on a survey of professionals who work at telecom SPs. Omdia developed the questionnaire in collaboration with project sponsor Netcracker. The survey was fielded globally in April and May 2026.

In addition to working at a global SP, respondents had to self-certify that they performed executive-level roles (director and above) to qualify. After reviewing all submissions, 80 respondents were deemed to be qualified participants.

Jim Hodges, Research Director, GTM Telecom Insights and Advisory

Omdia consulting

Omdia is a market-leading data, research, and consulting business focused on helping digital service providers, technology companies, and enterprise decision makers thrive in the connected digital economy. Through our global base of analysts, we offer expert analysis and strategic insight across the IT, telecoms, and media industries.

We create business advantage for our customers by providing actionable insight to support business planning, product development, and go-to-market initiatives.

Our unique combination of authoritative data, market analysis, and vertical industry expertise is designed to empower decision-making, helping our clients profit from new technologies and capitalize on evolving business models.

Omdia is part of Informa TechTarget, a B2B Materials information services business serving the technology, media, and telecoms sector. The Informa group is listed on the London Stock Exchange.

We hope that this analysis will help you make informed and imaginative business decisions. If you have further requirements, Omdia's consulting team may be able to help your company identify future trends and opportunities.

Get in touch

www.omdia.com
askananalyst@omdia.com



Copyright notice and disclaimer

The Omdia research, data, and information referenced herein (the "Omdia Materials") are the copyrighted property of TechTarget, Inc. and its subsidiaries or affiliates (together "Informa TechTarget") or its third-party data providers and represent data, research, opinions, or viewpoints published by Informa TechTarget and are not representations of fact.

The Omdia Materials reflect information and opinions from the original publication date and not from the date of this document. The information and opinions expressed in the Omdia Materials are subject to change without notice, and Informa TechTarget does not have any duty or responsibility to update the Omdia Materials or this publication as a result.

Omdia Materials are delivered on an "as-is" and "as-available" basis. No representation or warranty, express or implied, is made as to the fairness, accuracy, completeness, or correctness of the information, opinions, and conclusions contained in Omdia Materials.

To the maximum extent permitted by law, Informa TechTarget and its affiliates, officers, directors, employees, agents, and third-party data providers disclaim any liability (including, without limitation, any liability arising from fault or negligence) as to the accuracy or completeness or use of the Omdia. Informa TechTarget will not, under any circumstance whatsoever, be liable for any trading, investment, commercial, or other decisions based on or made in reliance of the Omdia Materials.

This Omdia White Paper was commissioned by Netcracker.

Netcracker's approach to accelerate B2B growth

The B2B services market presents one of the largest growth opportunities for CSPs, with demand expanding across AI-enabled services, NaaS, private networks, satellite connectivity, and industry-specific solutions. However, capturing this opportunity requires far more than launching new offerings. CSPs must simplify increasingly complex sales processes, deliver seamless digital customer experiences, and support new business models built around ecosystems, partnerships, and shared revenue.

Many operators remain constrained by fragmented BSS/OSS environments, disconnected product and customer data, manual sales processes, and legacy commercial systems. These limitations slow the design and quotation of complex enterprise solutions, extend sales cycles, reduce pricing accuracy and profitability, and make it difficult to deliver the digital, AI-enabled experiences that enterprise customers increasingly expect.

Netcracker addresses these challenges with an AI native BSS platform designed to accelerate B2B growth across the entire business lifecycle. At the front end, its telecom-specific B2B CPQ, dynamic product catalog, and AI agents dramatically accelerate the sales process by enabling rapid service design, intelligent configuration, automated quotation, and profitability validation for even the most complex enterprise solutions. Sales teams can respond faster to customer requirements while ensuring technical feasibility, commercial accuracy, and consistent margins.

Beyond sales acceleration, Netcracker transforms customer and partner engagement through intuitive digital experiences enhanced by AI. Enterprise customers gain greater visibility and control through self-service portals with adaptive user interfaces, while AI agents provide intelligent guidance, proactive support, and personalized interactions across every stage of the customer journey. This creates a more responsive, efficient, and engaging experience for both customers and internal teams.

The platform also enables CSPs to expand into new markets and business models by supporting partner ecosystems, flexible commercial models, and collaborative service delivery. Operators can efficiently onboard and manage partners, automate revenue-sharing and settlement processes, and rapidly commercialize emerging opportunities ranging from marketplace services to Physical AI, satellite connectivity, and other next-generation B2B/B2B2X offerings.

By bringing together customer engagement, product management, monetization, fulfillment, assurance, and partner ecosystem management on a unified AI native platform, Netcracker enables CSPs to accelerate sales, deliver superior digital experiences, and confidently expand into new revenue opportunities. The result is a faster, more agile, and future-ready business that is equipped to capture the next wave of enterprise growth.

This section was provided by Netcracker.