

Digital Transformation Platforms: Competitive Landscape Assessment

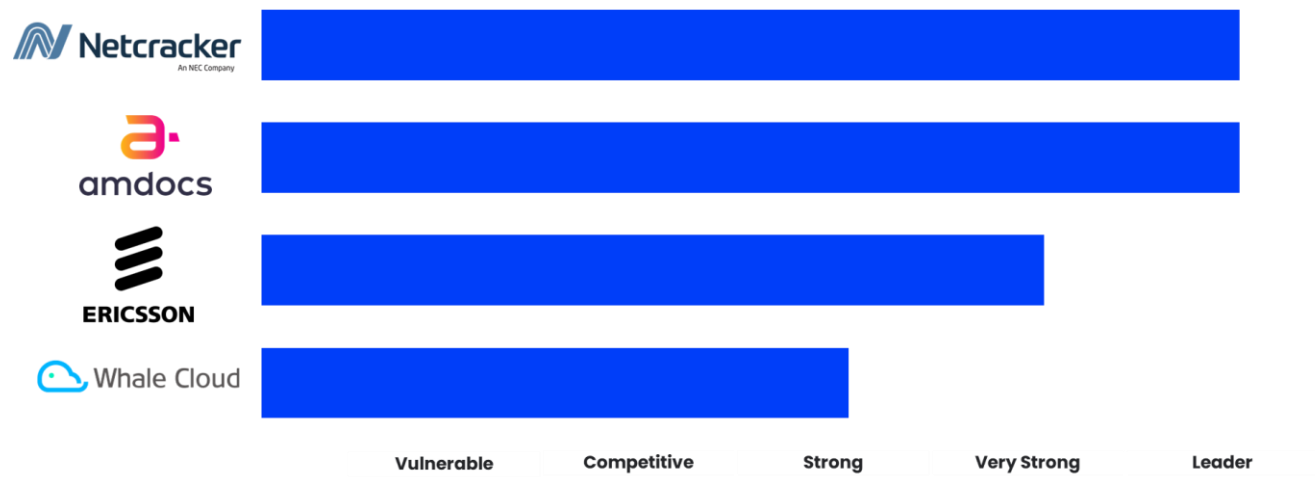
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Report Summary

Vendors are evolving digital transformation platforms into AI-native ecosystems with agentic AI, automation, and OSS/BSS convergence. The market is moving toward autonomous operations, open platforms, and faster monetization of digital services.

Product Class Scorecard

Source: © 2026 GlobalData



Market Overview

Product Class	Digital Transformation Platforms
Market Definition	Digital transformation platforms are comprehensive software portfolios that enable CSPs to transform their operations, processes, and customer experiences through the integration of digital technologies. These platforms typically include capabilities such as advanced analytics, artificial intelligence (AI), automation, and cloud computing.

	The products in this market address the problem/opportunity of communication service providers (CSPs) needing to modernize their operations and stay competitive in a rapidly evolving digital landscape. These platforms provide a framework to implement digital technologies and strategies that can improve efficiency, enhance customer experiences, and create new revenue streams. By leveraging digital transformation platforms, CSPs can transform their business models, operations, and services as well as stay ahead of the competition.
Rated Competitors	• Amdocs CES26 • Ericsson Business and Operations Support System/Digital Monetization Platform • Netcracker Digital Platform • Whale Cloud Digital BSS/OSS Suite
Additional Competitors	• Huawei • Nokia • Oracle
Changes Since Last Update	• June 2026: T-Mobile expanded its long-term partnership with Netcracker to enhance its cloud platform and support digital-first service delivery. The engagement extends Netcracker's role in cloud-native BSS transformation and service automation. • June 2026: Three Scandinavia selected Amdocs as a strategic partner to support parts of its ongoing business and digital transformation across Sweden and Denmark. The program is focused on simplifying and modernizing selected customer engagement and commerce capabilities. As part of the engagement, Amdocs will consolidate key processes across marketing, sales, and service onto its Customer Engagement Platform. • December 2025: After the FCC granted AT&T and AST Space Mobile the ability to test direct-to-cellular connectivity on public safety's Band 14 spectrum earlier in the year, federal, state and local public safety agencies trialed direct-to-cellular connectivity on the FirstNet network. This included voice, data and mission-critical push-to-talk via AST SpaceMobile's BlueBird satellites in orbit. • June 2026: Indonesia-based Linknet deployed Whale Cloud's ZSmart iNOC platform to modernize its network operations center (NOC). The implementation consolidates multi-vendor network data onto Whale Cloud's unified platform. • March 2026: Ericsson signed a multi-year agreement with SoftBank Corp to expand and modernize SoftBank's core network infrastructure. The agreement will tap the full scope of Ericsson's Core Networks' portfolio,

including the Ericsson dual-mode 5G Core solution running on Ericsson's Cloud Native Infrastructure Solution (CNIS).

- **February 2026:** Nokia expanded its long-term partnership with AT&T through a multi-year agreement to modernize the operator's voice core and network automation capabilities. The deployment integrates cloud-native core applications with AI- and machine learning-enabled automation to improve operational efficiency and support new 5G services.

Source: GlobalData

Market Assessment

The digital transformation platform (DTP) market is undergoing a significant shift as vendors move beyond traditional OSS/BSS modernization to deliver AI-native platforms capable of enabling autonomous operations, intelligent customer engagement, and digital business innovation. While cloud-native architectures, microservices, and industry standard APIs remain foundational capabilities, vendor differentiation is increasingly centered on the integration of artificial intelligence, particularly agentic AI, across the entire telecom value chain. Rather than positioning AI as a standalone capability, leading vendors are embedding it directly into business processes, network operations, customer management, and service orchestration to improve efficiency, reduce operational costs, and accelerate service delivery.

A defining trend in the market is the emergence of agentic AI, where AI systems evolve from assisting users to autonomously executing business and operational tasks with minimal human intervention. Vendors are introducing AI agents capable of managing customer interactions, resolving service issues, automating order fulfillment, generating personalized offers, optimizing billing operations, supporting software development, and orchestrating complex cross-domain workflows. These AI agents leverage large language models (LLMs), retrieval-augmented generation (RAG), and enterprise knowledge bases to provide contextual decision-making while interacting with multiple OSS/BSS applications.

Suppliers are integrating AI copilots across CRM, billing, service assurance, workforce management, product lifecycle management, and network operations. These copilots assist customer service representatives, automate documentation, accelerate software development, simplify catalog management, generate insights from operational data, and improve decision-making. As CSPs progress toward autonomous operations, vendors are increasingly positioning agentic AI as a key enabler of intent-driven networks and closed-loop automation. At the same time, vendors are investing in AI governance, security, and responsible AI frameworks to address growing concerns around data privacy, regulatory compliance, model explainability, and enterprise adoption.

Partnerships have become a critical competitive differentiator. Rather than developing every AI capability internally, telecom software vendors are strengthening collaborations with hyperscalers, AI infrastructure providers, and enterprise software companies. Integrations with cloud platforms, foundation models, GPU providers, and enterprise productivity tools enable vendors to accelerate innovation while providing CSPs with greater deployment flexibility. These ecosystems also support

multi-cloud strategies and facilitate access to advanced AI capabilities without requiring operators to build or manage AI infrastructure independently.

Vendors are also expanding their platforms beyond traditional telecom functions to support digital ecosystem enablement. Increasing emphasis is being placed on API monetization, marketplace management, partner lifecycle management, fintech services, CPaaS, digital channels, and B2B2X business models. As CSPs diversify into enterprise digital services, vendors are positioning their platforms as comprehensive digital business enablement suites capable of supporting both connectivity and non-connectivity revenues.

Another notable trend is the convergence of OSS and BSS capabilities into unified digital platforms. Vendors are integrating service orchestration, assurance, inventory, charging, customer engagement, analytics, and AI into common cloud-native architectures that provide end-to-end visibility and automation. This convergence enables CSPs to streamline operations, improve customer experience, accelerate product launches, and simplify the management of increasingly complex 5G, fiber, IoT, private network, and edge computing services.

Competition in the DTP market has consequently intensified. Traditional telecom software vendors are investing heavily in AI innovation while simultaneously modernizing their product portfolios to support SaaS delivery, modular deployments, and API-first architectures. Success is increasingly determined not only by the breadth of OSS/BSS functionality but also by the maturity of AI capabilities, ecosystem partnerships, deployment flexibility, and the ability to deliver measurable business outcomes. Over the next few years, vendors that successfully combine agentic AI, cloud-native platforms, open architectures, and automation into cohesive digital transformation offerings will be best positioned to support CSPs' transition toward autonomous, AI-driven digital service providers.

Market Drivers

- **AI-Driven Business and Operational Transformation:** CSPs are increasingly adopting digital transformation platforms to embed agentic AI across customer engagement, network operations, service assurance, billing, and business support functions.
- **Modernization of Legacy OSS/BSS Environments:** CSPs continue to replace fragmented and aging OSS/BSS systems with cloud-native, modular platforms that offer greater scalability, flexibility, and agility.
- **Need for Superior Digital Customer Experience:** Customers increasingly expect personalized, seamless, and omnichannel digital experiences. Digital transformation platforms enable AI-driven customer engagement, real-time personalization, self-service capabilities, and proactive service management.
- **Growing Adoption of Automation and Autonomous Operations:** Increasing network complexity, driven by 5G, fiber, cloud, and multi-domain environments, is accelerating demand for intelligent automation. Vendors are embedding AI-powered orchestration, predictive analytics, and closed-loop automation capabilities that reduce manual intervention and improve service quality.

- **5G and Next-Generation Service Monetization:** The commercialization of 5G (SA), network slicing, private networks, IoT, and edge computing is creating demand for platforms capable of supporting real-time charging, service orchestration, partner management, and flexible monetization models.
- **Demand for Cloud-Native and SaaS Deployments:** Growing adoption of hybrid and multi-cloud strategies is driving demand for cloud-native platforms built on microservices, containers, Kubernetes, and API-first architectures. SaaS-based deployment models further reduce infrastructure complexity, enable faster upgrades, and lower the total cost of ownership.

Buying Criteria

- **Portfolio Breadth:** To assess true portfolio capabilities, GlobalData assesses each vendor's focus across three main areas: OSS/orchestration, business support systems (BSS), and customer-facing channels. In addition, GlobalData weighs the degree of support for various public cloud platforms, notably Amazon Web Services (AWS), Microsoft Azure, Google Cloud Platform, and Alibaba Cloud. Other factors considered include prime systems integrator capabilities, support for operations outsourcing, testing and certification outsourcing services, and degree of support for passthrough/B2B2X services offered to consumers and/or enterprises.
- **Capabilities and Expertise:** Within this area, GlobalData examines the vendor's total workforce devoted to digital transformation, including for various functions such as consulting and systems integration, user experience/design, and training. GlobalData also examines vendor support for relevant certifications, including those related to customer care, network, and retail. Additional criteria include analysis of the most relevant digital transformation partnerships; digital transformation-related R&D and intellectual property assets; and any other technologies.
- **Tools and Methodologies:** GlobalData assesses vendors' utilization of AI and analytical tools and methodologies to enhance their digital transformation capabilities as well as any tools being offered to assist CSPs in managing third-party ecosystems in support of digital transformation goals. Finally, GlobalData assesses the degree to which agile development and other relevant tools or methodologies are used to provide unique value to customers.
- **Delivery and Commercial Flexibility:** Analysis focuses on flexibility of business models enabled by vendors, including support for 'as-a-service' and 'pay-as-you-go' delivery; support for risk/reward- and outcome-based compensation; and joint innovation with CSPs. A vendor's flexibility in terms of offering modular support to cater to customers not ready or willing to embrace a full stack of digital transformation software platforms or functionalities is also analysed.
- **Stability and Momentum:** GlobalData assesses vendor stability by analysing recent financial performance, including revenue and margin performance, debt profile, and other factors indicating corporate stability. Momentum is analysed by referencing total digital transformation customer base; recent momentum with 'showcase' customers; and new badges as well as expanded customer relationships in the past year.

Vendor Recommendations

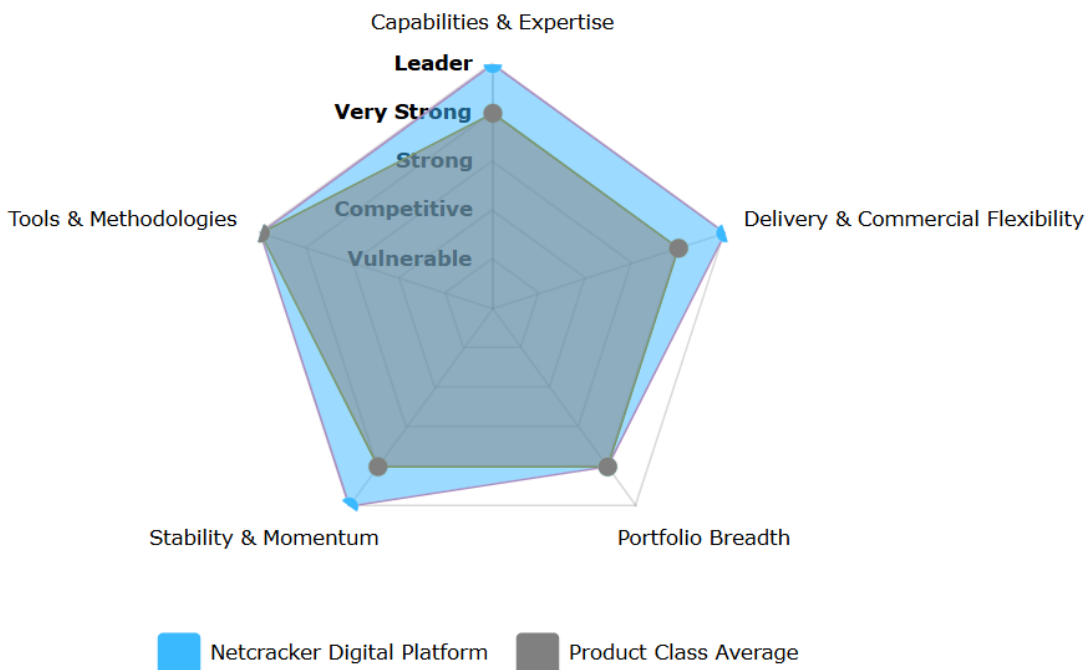
- **Accelerate Investment in Agentic AI:** Vendors need to move beyond AI copilots and invest in agentic AI capabilities that can autonomously execute business and operational workflows across OSS, BSS, customer engagement, and network operations.
- **Strengthen AI-Native Platform Capabilities:** AI should be embedded across the platform rather than offered as standalone functionality. Vendors should integrate AI into service orchestration, billing, customer care, assurance, analytics, product lifecycle management, and network operations to enable end-to-end intelligent automation and improve operational efficiency.
- **Prioritize Measurable Business Outcomes:** Shift messaging from technology features to demonstrable business value. Vendors will have to provide clear evidence of operational cost savings, faster service delivery, improved customer experience, reduced churn, accelerated time-to-market, and increased monetization through customer references and quantified ROI.

Buyer Recommendations

- **Adopt AI-Native Digital Transformation Strategies:** CSPs should view AI as a core component of their digital transformation strategy rather than an add-on capability. Investments should focus on platforms that embed agentic AI across customer engagement, service fulfillment, network operations, assurance, and business processes to improve efficiency and accelerate decision-making.
- **Evaluate Vendors on Business Outcomes, Not Just Features:** Vendor selection should extend beyond functional capabilities to assess measurable business outcomes, including reductions in operational costs, faster service delivery, improved customer experience, increased automation, and accelerated time-to-market. Buyers should request customer references and proven deployment success before making strategic investments.
- **Plan for Future Business Models:** Choose platforms that can support emerging revenue opportunities, including 5G network slicing, private networks, IoT, edge computing, API monetization, digital marketplaces, and B2B2X services. Future-ready platforms will enable CSPs to diversify revenues beyond traditional connectivity offerings.

Rated Competitors

Product Name	Netcracker Digital Platform
Current Perspective	Netcracker's Digital Platform presents a comprehensive and well-integrated portfolio spanning OSS, BSS, customer engagement, and orchestration. It provides strong end-to-end coverage, supported by consulting, system integration, and managed services, positioning the company as a strategic partner for large-scale transformation programs, particularly in complex, legacy-heavy environments. Its flexible delivery models, including

	hybrid and cloud-based deployments, align well with CSP expectations around long-term transformation and operational outsourcing. In addition, Netcracker is increasingly embedding agentic AI capabilities within its platform, enabling more autonomous, closed-loop operations, intelligent decision-making, and workflow automation across both OSS and BSS domains. The recent acquisition of CSG Systems by NEC has the potential to further strengthen this overall proposition. CSG brings established strengths in customer engagement, monetization, and digital experience platforms, which can complement Netcracker's traditional strengths in OSS, orchestration, and large-scale integration. When combined with Netcracker's emerging agentic AI capabilities, this creates an opportunity to build a more intelligent, end-to-end platform that is not only operationally robust but also adaptive, customer-centric, and automation-driven. The key will be how effectively these combined assets are integrated and positioned. Netcracker could benefit from clearly articulating how CSG's capabilities and its own agentic AI enhancements strengthen its DTP, particularly in areas such as SaaS-based monetization, API-driven ecosystems, and autonomous customer engagement. If executed well, this integration can help shift the perception from an integration-led transformation provider to a more AI-native, platform-centric, and experience-driven player.
Buying Criteria Rating	Capabilities & Expertise: Leader Delivery & Commercial Flexibility: Leader Portfolio Breadth: Very Strong Stability & Momentum: Leader Tools & Methodologies: Leader
Product Scores	Leader  Capabilities & Expertise Leader Very Strong Strong Competitive Vulnerable Tools & Methodologies Delivery & Commercial Flexibility Portfolio Breadth Stability & Momentum Netcracker Digital Platform Product Class Average

Strengths	• Netcracker tightly combines OSS, BSS, orchestration, and CX into a unified platform. This enables it to handle complex, multi-domain transformations more cohesively than many peers. • Integration with CSG Systems under NEC improves monetization and customer engagement. This creates a more balanced and commercially relevant portfolio. • Its embedded agentic AI capabilities support autonomous workflows and closed-loop automation across operations. This strengthens its ability to move toward intelligent, self-operating networks and IT.
Limitations	• What Netcracker's portfolio will look like once it absorbs CSG is not yet clear, so the company has yet to articulate its strengths. • While Netcracker is highly proactive in advancing its agentic AI capabilities, the actual value delivered depends on the depth of implementation. Its effectiveness is closely tied to how seamlessly these capabilities are embedded across end-to-end workflows. • Despite a strong portfolio and partnerships, Netcracker faces rising pressure as rivals advance with SaaS-native, composable models, forcing it to sharpen platform differentiation.

Source: GlobalData