Digital Transformation Platforms: Competitive Landscape Assessment

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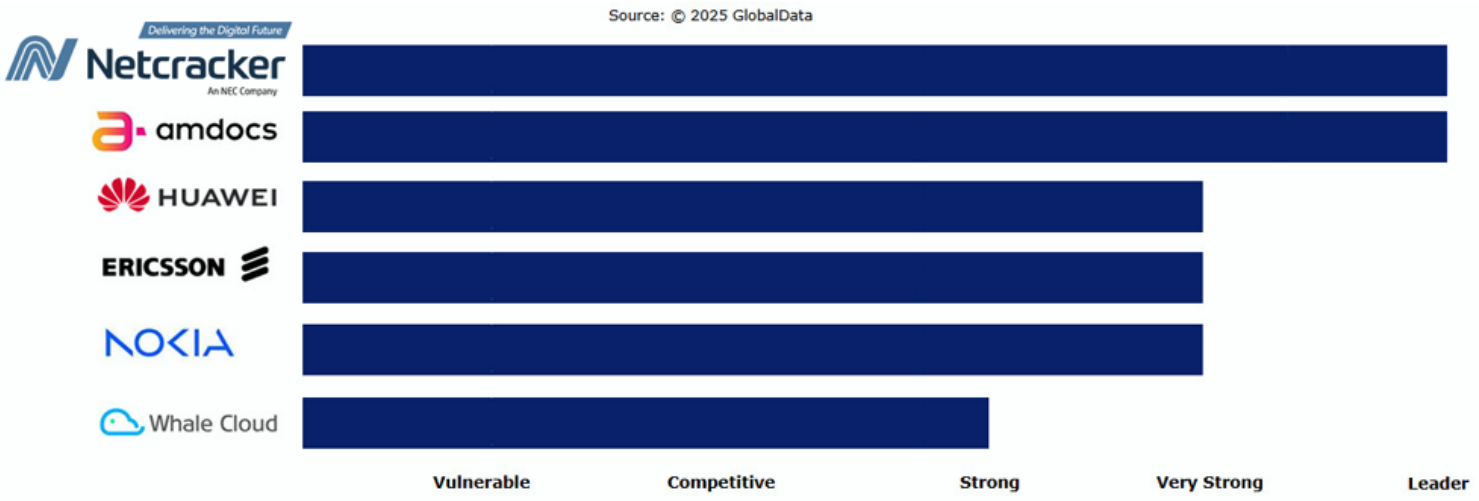
REPORT SUMMARY:

Vendors excel in cloud-native, AI-driven platforms and BSS/OSS convergence for 5G. Yet many lag in GenAI-led customer experience and composable design, limiting flexibility and slowing integration across broader digital transformation efforts.

PRODUCT CLASS SCORECARD



MARKET OVERVIEW

Product Class	Digital Transformation Platforms
Market Definition	Digital transformation platforms are comprehensive software portfolios that enable communication service providers (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 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 CES25 • Ericsson Business and Operations Support System/Digital Monetization Platform • Huawei Digital Transformation Solutions • Netcracker Digital Platform • Nokia Digital Transformation Suite • Whale Cloud Digital BSS/OSS Suite
Additional Competitors	• CSG • Oracle
Changes Since Last Update	• **June 2025**: Vodafone Qatar selected Nokia to modernize its telecom operations. Nokia's multi-cloud core software solutions, including packet core, converged charging, and network data analytics function, will bring cloud-native grade automation, agility, and scalability to Vodafone Qatar's multi-access core network. • **May 2025**: Amdocs completed a billing and charging system upgrade for T-Mobile Czech Republic, executing the upgrade without disrupting the service provider's customer experience. The new platform provides T-Mobile Czech Republic with modernized billing and charging operations. • **March 2025**: Zain KSA partnered with Netcracker on a comprehensive, full-stack, AI-driven IT transformation based on Netcracker Digital Platform as well as Netcracker's suite of managed services. The project included replacing Zain KSA's existing IT stack and migrating customers to the newer cloud-based systems. This digital transformation program with Netcracker Technology, which included BSS/OSS transformation across all lines of business, was achieved in less than three years. • **March 2025**: Ericsson and Ooredoo Qatar signed an MoU to accelerate enterprise digital transformation through tailored 5G solutions. They will jointly develop private or dedicated 5G networks for industries like manufacturing, airports, and oil & gas, leveraging Ericsson Private 5G and mission-critical network solutions. • **March 2025**: Whale Cloud migrated telecom provider (based in Oman) AWASR's fixed-line business from a legacy system to its advanced digital BSS. The new system supports multiple channels, including POS, dealer app/portal, and USSD as well as enables end-to-end digital B2B sales management.

MARKET ASSESSMENT

Telcos are under growing pressure to evolve from traditional connectivity providers into agile digital service providers. This shift is being driven by the need to modernize aging infrastructure, monetize new revenue streams such as 5G and B2B2X, and meet rising expectations for real-time, personalized customer experiences. At the core of this transformation are digital transformation platforms—comprehensive, cloud-native, and AI-powered platforms that unify BSS, OSS, customer engagement, partner management, and service orchestration into a cohesive, agile environment.

One of the most significant changes in recent years has been the emergence of Generative AI (GenAI), AI agents, and agentic systems as integral components of these platforms. GenAI is reshaping how telcos approach customer experience, service design, and internal automation. For example, GenAI enables natural language-based interfaces for both customers and employees, streamlining tasks such as service provisioning, troubleshooting, and product discovery. Telcos are slowly embedding GenAI into digital channels and customer care systems to deliver contextual, intelligent, and self-evolving interactions.

In parallel, AI agents – autonomous software entities that perform complex tasks with minimal human intervention – are increasingly being deployed to manage network operations, marketing campaigns, and sales processes. These agents can dynamically adjust network parameters based on traffic conditions, predict and resolve faults, or tailor offers to customers in real time. When deployed across multiple domains, agentic AI systems made up of networks of collaborating AI agents introduce an entirely new level of automation, adaptability, and intelligence. For telcos, agentic AI represents the next frontier in achieving intent-driven operations and zero-touch service management.

Beyond AI, several structural shifts are reinforcing the urgency for digital transformation. First is the monetization of 5G and edge services. Operators require real-time, scalable platforms that can support use cases like private 5G networks, network slicing, and industrial automation. These require not just flexible architecture, but the intelligence and agility to adapt to changing demands, something GenAI and AI agents are well positioned to support.

Second is the shift toward cloud-native and composable architectures. By decomposing monolithic systems into modular components that can be deployed independently, telcos gain the agility to launch new services quickly, scale efficiently, and experiment without disrupting core systems. Digital transformation platforms built on Kubernetes, microservices, and DevOps pipelines allow CSPs to respond to market shifts and technology changes with far greater speed.

Third, telcos are rapidly expanding into enterprise digital services and partner-led ecosystems. B2B and B2B2X business models require platforms that support open APIs, integration hubs, monetization engines, and partner marketplaces. This is where agentic AI again becomes valuable: by enabling dynamic partner onboarding, SLA enforcement, and cross-ecosystem automation, it can dramatically reduce friction and operational overhead.

The vendor landscape is evolving to meet these complex requirements. Established players like Amdocs, Netcracker, Huawei, and Ericsson are embedding GenAI and AI agent capabilities into their platforms, moving from process automation to decision automation. Challenger vendors are focusing on modularity and open integration, while innovators are building from the ground up with API-first and AI-native designs.

Ultimately, vendors must deliver digital platforms that are not just cloud-native and open, but also deeply intelligent, designed to learn, adapt and collaborate across systems and ecosystems to help telcos drive agility, innovation and long-term value. Those that successfully integrate GenAI and agentic automation will be best positioned to lead in the era of programmable, autonomous networks and AI-driven digital service delivery.

MARKET DRIVERS

- **AI-Enhanced Customer Experience:** Rising demand for personalized, real-time, omnichannel experiences is driving CSPs to adopt AI-powered customer experience platforms. These platforms use customer data to automate care, tailor services, and enhance satisfaction through tools like chatbots and virtual assistants.
- **GenAI and Autonomous Operations:** GenAI, AI agents, and agentic systems are reshaping telco operations, customer service, and innovation. These intelligent platforms power self-healing networks, predictive assurance, and deeply personalized digital experiences.
- **Open Standards and API Ecosystem:** The adoption of TM Forum Open APIs, and open digital architectures is helping telcos build modular, interoperable, and vendor-agnostic systems—reducing integration complexity and enabling faster, ecosystem-driven innovation.
- **Operational Efficiency and Cost Optimization:** Increasing network complexity and margin pressure are driving the need for automation in fulfillment, assurance, and billing. Digital platforms reduce manual effort, streamline operations, and enable zero-touch provisioning and closed-loop assurance.
- **5G Monetization and New Revenue Models:** To monetize 5G use cases like private networks, slicing, and edge computing, operators need flexible platforms with dynamic charging, real-time orchestration, and scalable service creation, driving strong demand for AI-enabled digital platforms.
- **Cloud-Native Architecture and IT Modernization:** To boost agility and cut costs, telcos are shifting from legacy monolithic systems to microservices-based, cloud-native architectures. Increasing public cloud adoption further enables faster deployments, CI/CD, elastic scaling, and smooth integration across digital and partner ecosystems.

BUYING CRITERIA

- **Portfolio Breadth**: To assess true portfolio richness, 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 such as blockchain being used.
- **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 analyzed.
- **Stability and Momentum**: GlobalData assesses vendor stability by analyzing recent financial performance, including revenue and margin performance, debt profile, and other factors indicating corporate stability. Momentum is analyzed 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.

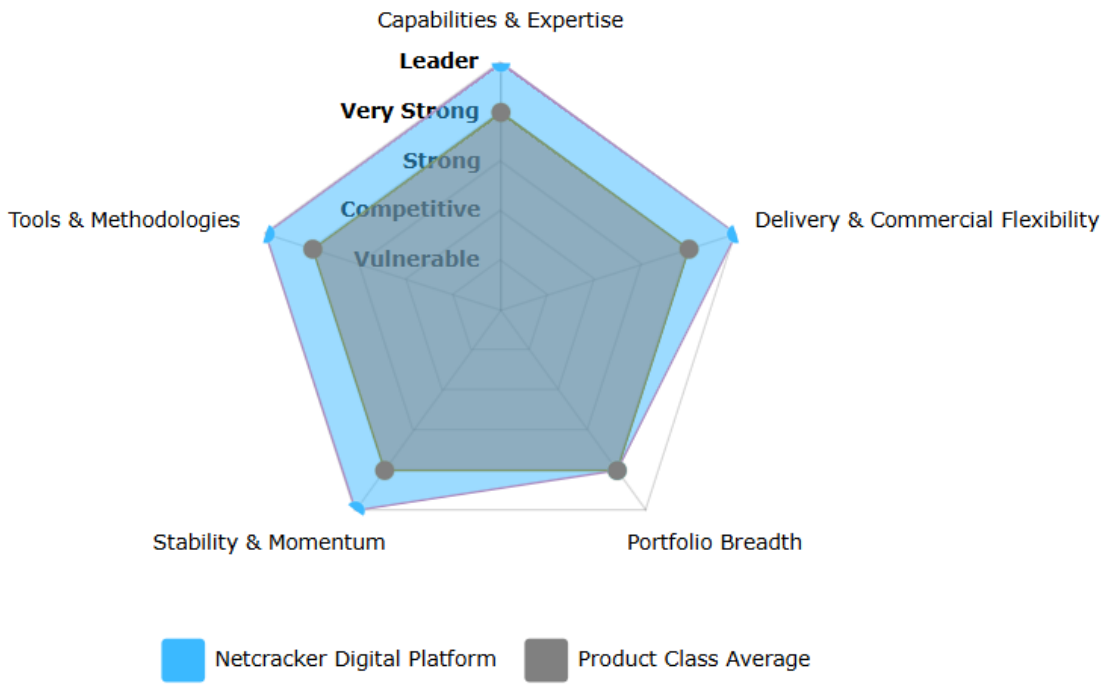
VENDOR RECOMMENDATIONS

- **Deepen GenAI and AI Agent Capabilities:** Vendors must embed GenAI agents across care, sales, assurance, and orchestration to drive real-time, autonomous execution. Investing in agentic AI enables multi-agent collaboration for lifecycle management, service modeling, and closed-loop automation, empowering CSPs to reduce complexity, enhance agility, and achieve zero-touch operations across digital and network domains.
- **Customer Experience Enhancement:** To enhance the customer experience, vendors should leverage AI for personalization and proactive support, ensure seamless omnichannel engagement, act on real-time feedback, deliver reliable services, use intuitive interfaces, provide robust security, and continuously improve based on feedback and trends to foster satisfaction and loyalty.
- **Embrace Composable, Modular Architectures:** Vendors must go beyond offering modular, microservices-based platforms by actively helping telcos adopt composable, evergreen software models. This includes providing flexible licensing, cloud-native professional services, rapid onboarding, and tooling that supports incremental upgrades, ensuring telcos can truly realize agility and innovation without major disruption.

BUYER RECOMMENDATIONS

- **Focus on Business Outcomes, Not Just Tech:** CSPs should ask vendors how their platform drives measurable KPIs such as lower OpEx, faster service launches, ARPU growth, and better customer satisfaction. They should request real-world case studies or success metrics from similar operators to validate claims and ensure the platform delivers tangible business outcomes, not just technical capabilities.
- **Evaluate Vendor Agility and Roadmap Transparency:** CSPs should evaluate a vendor’s product roadmap to ensure alignment with future needs. They need to assess how frequently updates are delivered and whether the vendor supports agile, continuous innovation. A responsive roadmap and regular enhancements indicate the vendor’s ability to adapt to market shifts and sustain long-term value through ongoing improvements.
- **Assess Customer Experience Capabilities**: CSPs should seek vendors that offer tools for analyzing customer data to provide personalized services and recommendations, significantly enhancing customer satisfaction and loyalty. Verify that the vendor provides AI-driven chatbots and virtual assistants for efficient and immediate customer support to improve overall service quality.

Featured Competitor

Product Name	Netcracker Digital Platform
Current Perspective	Netcracker Digital Platform is a cloud-native, microservices-based solution that unifies BSS and OSS to enable full-stack digital transformation for telecom operators. It supports 5G monetization, B2B2X models, and ecosystem-driven innovation with advanced capabilities in converged charging, policy control, and partner lifecycle management. The platform features embedded AI and GenAI for automation, predictive assurance, and personalized customer experiences across omnichannel touchpoints. Its verticalized industry templates and orchestration tools accelerate service design and rollout. Netcracker also enables digital ecosystem integration through robust API management, allowing CSPs to launch new digital services and revenue streams. While Netcracker drives innovation through customer-specific co-development in its centers of excellence. Its platform lacks a truly open developer ecosystem, with limited external APIs, sandboxes, or third-party tooling, reducing broader innovation beyond its direct engagements. To stay ahead, Netcracker must expand GenAI use cases and open its platform to third-party developers, ensuring continued leadership in the telecom software landscape.
Buying Criteria Rating	**Capabilities & Expertise:** Leader **Delivery & Commercial Flexibility:** Leader **Portfolio Breadth:** Very Strong **Stability & Momentum:** Leader **Tools & Methodologies:** Leader
Product Scores	**Leader** 
Strengths	• Netcracker is one of the few vendors offering a single, pre-integrated platform covering BSS, OSS, and digital partner management with verticalized B2B2X support. • Netcracker's GenAI-driven platform enables support for specialized telco-centric agents such as care assistant, agent partner, sales assistant, catalog assistant, and digital operations technician. • Netcracker is expanding co-innovation with Tier 1 CSPs to build AI-native BSS/OSS frameworks. These efforts go beyond monetization to address regulatory compliance, ethical AI use, and sector-specific governance, particularly in markets aligning telecom transformation with national AI strategies.

Limitations	• Netcracker is caught between legacy rivals and fast-moving digital disruptors offering agile, SaaS-native platforms, threatening its growth, eroding market share and challenging its ability to stay competitive. • Netcracker does not offer an open developer portal, public API sandbox, or extensible tooling ecosystem. This restricts telco IT teams and partners from independently building or customizing solutions, reducing innovation flexibility and slowing third-party integration. • Despite a strong portfolio and partnerships, Netcracker faces rising pressure as rivals advance with SaaS-native, composable models, forcing it to sharpen platform differentiation.

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