

Revenue Management: Competitive Landscape Assessment

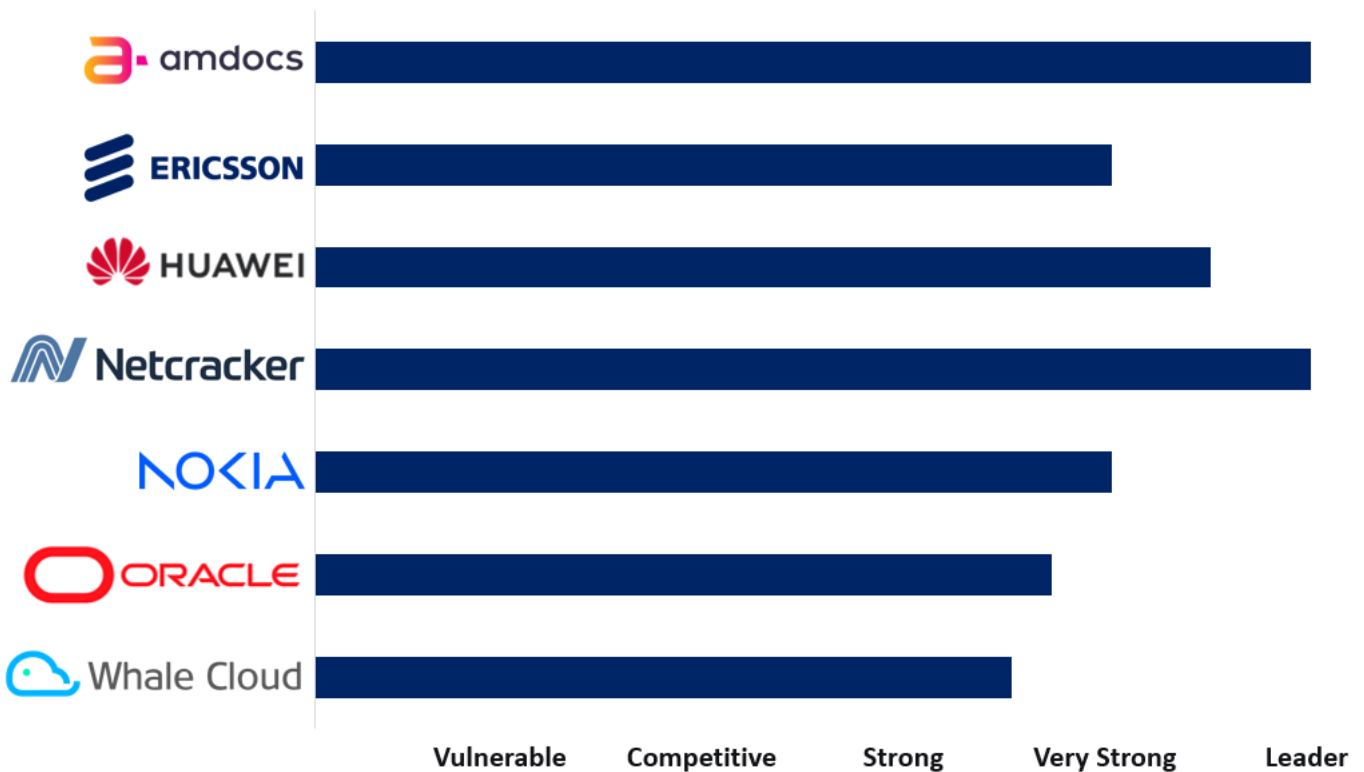
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REPORT SUMMARY:

Vendors are transforming revenue management by embedding GenAI, SaaS, and agent-based solutions while enabling AI-driven, real-time billing, and cloud-native platforms to support 5G services, B2B2X models, and digital service monetization.

PRODUCT CLASS SCORECARD

Competitive Impact



Market Overview

Product Class	Revenue Management
Market Definition	<p>The revenue management market consists of business support system (BSS) offerings primarily related to mediation, converged rating and charging, online charging systems (OCS), customer billing management, partner billing management, collections management, bill presentment, voucher management, policy control and charging, and monetization.</p> <p>Essential for telco monetization, revenue management is rapidly evolving to meet the rise of 5G and digital services like streaming. Key vendors are offering cloud-native, AI-driven platforms that enable real-time billing, charging, and policy control. These solutions are critical for communication service providers (CSPs) as they manage complex 5G use cases and hybrid business models. The shift toward dynamic, converged billing systems is helping CSPs adapt to evolving customer expectations and new revenue streams from services like edge computing and network slicing.</p> <p>CSPs face significant challenges in modernizing legacy systems, handling complex 5G charging models, and preventing revenue leakage. As they partner with vertical industries and expand their service offerings, many are adopting hybrid billing systems to manage both traditional and digital services. AI-powered analytics and automation tools are becoming key in optimizing revenue strategies and improving customer experiences. The overall trend is toward greater flexibility, scalability, and customer-centric billing.</p> <p>The revenue management vendor landscape includes top-tier OSS/BSS suppliers as well as specialized vendors like Matrixx, Nexign, CSG, Hansen, Cerillion, Comarch, and Tecnotree that may focus more on pre-packaged, standardized, cloud-delivered solutions.</p>
Rated Competitors	<ul style="list-style-type: none"> • Amdocs Revenue Management • Ericsson Digital BSS • Huawei Revenue Management • Netcracker Revenue Management • Nokia Revenue Management • Oracle Cloud Scale Monetization • Whale Cloud ZSmart Digital BSS
Additional Competitors	<ul style="list-style-type: none"> • Comarch • Cerillion • CSG • Hansen • Matrixx Software • Nexign • Tecnotree • Qvantel

Changes Since Last Update

- **September 2025:** Optiva and Qvantel have entered a strategic transaction, combining cloud-native charging, agentic AI, and digital BSS expertise. They offer AI-enabled, full-stack BSS and agile revenue management as an alternative to established vendors.
- **August 2025:** Amdocs upgraded Telkom's (based in South Africa) legacy BSS to Amdocs Customer Experience Suite (CES). As part of the transformation, Telkom South Africa will get unified digital commerce and care journeys built by Amdocs Studios using a complete microservices layer and user interface accelerators.
- **May 2025:** Izzi, a subsidiary of Mexican Televisa Group, is modernizing its BSS in the cloud. By upgrading to the latest version of Oracle Communications Digital Business Experience running on Oracle Cloud Infrastructure, Izzi claims to have reduced billing times by 70% and invoicing times by 60%, allowing the company to receive payments faster and improve cash flow.
- **March 2025:** Zain KSA completed its BSS/OSS transformation across all lines of business in less than three years. Zain KSA partnered with Netcracker on a full-stack, AI-driven IT transformation based on Netcracker Digital Platform as well as Netcracker's suite of managed services. The project replaced Zain KSA's legacy IT stack and migrated customers to the new cloud-based systems.
- **March 2025:** Qvantel and Nokia supplied their joint digital monetization solution to Uzbekistan based mobile operator Perfectum to launch FWA on its 5G standalone network.
- **October 2024:** Ericsson reaffirmed its partnership with Tmcel Mozambique to digitally transform its monetization suite and enhance its customer experiences with the deployment of several Ericsson solutions. The deployed suite of Ericsson solutions includes Ericsson Charging and Ericsson Mediation from its OSS/BSS portfolio.

Market Assessment

The telecom revenue management market is in the midst of a profound transformation, driven by the rise of 5G, digital ecosystems, and enterprise-centric monetization models. Legacy billing systems, once sufficient for voice and data, can no longer meet the complexity of converged services, network slicing, and B2B2X ecosystems. CSPs now require cloud-native, real-time charging and billing platforms that support rapid product launches, dynamic bundling, and partner revenue sharing while also lowering operational costs and risks.

Since 2023, generative AI (GenAI) and agentic AI have also emerged as true disruptors in revenue management. These technologies are moving beyond experimentation into production capabilities across charging, billing, and revenue assurance. GenAI accelerates product catalog creation, tariff configuration, and personalized customer interactions while agentic AI introduces autonomous agents that can reconcile revenue leakage, resolve disputes, optimize promotions, and orchestrate partner settlements. Together, they are redefining operator expectations, shifting from traditional automation to intelligent, adaptive, and proactive revenue management.

The competitive landscape is evolving in parallel. Established vendors are embedding AI-native features within their revenue management suites to position themselves as trusted transformation partners for large operators. At the same time, emerging players are leveraging cloud-first, AI-native architectures to deliver modular deployments, SaaS-based models, and faster time-to-value, particularly appealing for

operators seeking selective modernization rather than a full-stack replacement. Vendors are also differentiating by launching marketplaces of pre-built AI agents and offering migration accelerators, reflecting the operator demand for speed and reduced risk.

Despite these advances, challenges persist. Migration from legacy billing systems remains resource-intensive and risky, especially given the billions of dollars that flow through these platforms. Integrating GenAI and agentic AI into revenue-critical environments also raises governance, compliance, and trust concerns. Many operators are therefore taking a hybrid approach, introducing AI-powered capabilities for new 5G and enterprise services while keeping legacy systems in place for established consumer businesses.

Looking forward, the revenue management market is converging toward intelligent, cloud-native, AI-empowered platforms. For CSPs, the opportunity extends beyond cost efficiency to driving growth through faster innovation cycles, personalized monetization, and more dynamic partnerships in the emerging B2B2X economy. Vendors that can prove the reliability and trustworthiness of GenAI and agentic AI in mission-critical operations will hold the strongest positions.

Market Drivers

- **5G-Driven Service Complexity:** The rollout of 5G is already reshaping the revenue management market as complex service models such as network slicing, IoT, edge services, and private networks demand real-time, usage-based charging and flexible revenue sharing. This shift is pushing CSPs toward advanced revenue management platforms that can process massive transaction volumes, support diverse service tiers, and manage dynamic service-level agreements.
- **Personalization and Customer Experience:** Customers increasingly expect personalized offers, flexible billing options, and seamless digital experiences. This drives the revenue management market, pushing systems to evolve with capabilities such as usage-based billing, subscription bundling, loyalty integration, and contextual upselling.
- **Growing B2B Demand:** Enterprises increasingly depend on CSPs for private networks and cloud services, requiring revenue management systems to manage complex B2B contracts and dynamic pricing. Mobile operators are also expanding into vertical industries like healthcare and manufacturing, driving demand for specialized billing systems tailored to industry-specific requirements.
- **Expansion of Digital Services:** The rise of digital content, including video streaming, gaming, and music services, has expanded telecom revenue streams beyond traditional voice and data. CSPs are looking for converged billing systems that can seamlessly manage and monetize these services.
- **Growth of Managed Services and SaaS Models:** The demand for managed, SaaS-based revenue management solutions is accelerating as operators seek to reduce integration complexity and transition from CapEx-heavy investments to OpEx-driven models, with vendors offering outcome-based and consumption-based pricing gaining strong traction in the market.
- **GenAI and Agentic AI:** AI is reshaping revenue management by moving beyond manual processes to intelligent automation. GenAI enhances agility in product and tariff design while tailoring offers to customer needs. Agentic AI adds real-time autonomy, addressing revenue leakage, disputes, promotions, and partner settlements. This shift to adaptive, AI-driven revenue management has become a defining industry trend.

Buying Criteria

- **Portfolio Capabilities:** Specific criteria include mediation, converged rating and charging, 5G charging function support, OCS capabilities, customer billing and partner billing management capabilities, collections management, bill presentment, voucher/loyalty plan management, analytics integration, policy control and charging portfolio, and enterprise monetization solutions.
- **Delivery Models:** Criteria include details about the depth and breadth of vendors' managed services offerings, support for emerging 'as-a-service' models, and flexibility and degree of support for hybrid/multicloud consumption. GlobalData also asked vendors about their support for waterfall and agile development methodologies as well as traditional delivery cycles achievable using the latest version of their BSS platforms. Finally, GlobalData asks vendors to identify significant delivery partners.
- **Service & Support:** GlobalData analyzes this in the relevant focus areas, support in terms of global solution delivery centers, and research and development (R&D) investment in terms of total investment and R&D/innovation focus areas.
- **Customer Success & Stability:** GlobalData assesses success and stability by analyzing recent financial performance, including revenue and margin performance, debt profile, and other factors that indicate corporate stability. It analyzes customer success by referencing the number and diversity of revenue management customers, recent momentum with 'showcase' customers, new badges, and expanded customer relationships in 2023-24.

Vendor Recommendations

- **Accelerate Cloud-Native and SaaS Models:** Operators are actively shifting to cloud-native, SaaS-based deployments to improve agility and reduce costs. Vendors should invest in microservices-based architectures, flexible APIs, and containerized delivery, alongside offering outcome-based or consumption-based pricing models that align with operator business objectives.
- **Prioritize AI-Native Differentiation:** Vendors should embed GenAI and agentic AI capabilities deeply into revenue management platforms, not as add-ons, but as core enablers of automation and personalization. Delivering pre-built AI agents for catalog management, revenue leakage prevention, and partner settlement can accelerate adoption and strengthen competitive positioning.
- **Tailor Solutions by Market Segment:** Large Tier 1 operators, emerging market CSPs, MVNOs, and enterprise-focused providers have very different requirements. Vendors should modularize offerings to serve each segment, ranging from full-stack transformation for Tier 1s to SaaS-based, lightweight solutions for digital-first players.

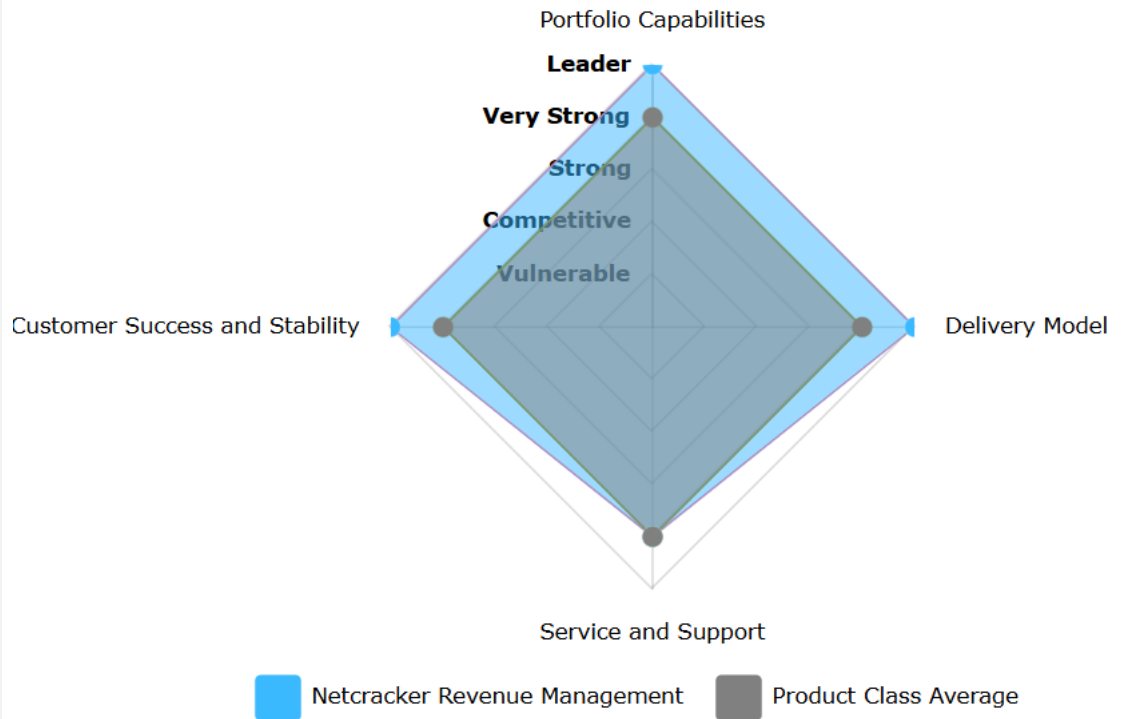
Buyer Recommendations

- **Focus on Customer-Centric Billing Models:** To meet rising expectations, operators should offer flexible subscription bundles, usage-based pricing, loyalty integration, and contextual upselling. Embedding personalization directly into billing flows strengthens customer experience and drives differentiation.
- **Adopt a Hybrid Modernization Strategy:** Rather than attempting risky 'big bang' replacements, operators should modernize revenue management in phases, starting with charging and new 5G/enterprise services, while retaining legacy systems for stable consumer revenues. This reduces migration risk while unlocking early monetization benefits.

- **Leverage GenAI and Agentic AI for Growth:** CSPs should look beyond cost reduction and use GenAI for rapid product catalog creation and reconciliation and personalized offers, and agentic AI for autonomous revenue assurance, customer assurance, and dispute management. These innovations can directly drive ARPU, customer retention, and partner monetization.

Netcracker

Product Name	Netcracker Revenue Management
Current Perspective	<p>Netcracker's revenue management is a core part of its broader digital BSS platform, providing CSPs with an integrated foundation to support consumer as well as complex B2B and B2B2X models. It enables flexible charging across fixed and mobile networks, accommodates diverse payment methods, and supports personalized pricing for digital-first business environments. Netcracker continues to innovate in monetization by exposing APIs through standards such as TMF, MEF, and CAMARA. This supports API-based pricing, revenue sharing, and ecosystem monetization. It also has a focus on deepening digital engagement with CPQ, product catalog and order management to support partner ecosystems. The platform also strengthens digital brand strategies with AI-powered KYC, customizable tariffs, and GenAI-driven agents, while its digital satellite solution addresses the monetization needs of LEO, GEO, and MEO satellite operators.</p> <p>At its core, Netcracker's revenue management delivers converged charging, billing, partner settlement, and revenue operations. It supports advanced 5G attribute-based charging, enabling monetization of latency, throughput, and device type, capabilities critical for network slicing and enterprise services. Its partner settlement engine automates dynamic multi-party revenue sharing, while integration with mediation, collections, billing, and policy control ensures seamless operations. Embedded GenAI and advanced analytics position it as more than a monetization engine, transforming it into an intelligence-driven revenue hub. A key differentiator is Netcracker's SaaS maturity and hyperscaler alignment. While many rivals are still evolving their SaaS portfolios, Netcracker already delivers production-grade, multi-tenant SaaS with evergreen upgrades and elastic scaling. Its deep partnerships with Amazon Web Services (AWS), Microsoft Azure, and other hyperscalers enable hybrid and multi-cloud monetization strategies, reinforced by marketplace availability and consumption-based pricing.</p> <p>Looking ahead, Netcracker is focusing its investments on four pillars: agentic AI to embed telecom-specific AI agents across revenue workflows, ecosystem and new business models to drive B2B2X and cross-industry monetization, API management to support API-first collaboration with real-time optimization, and connectivity monetization to turn any network into a billable service. Together, these innovations strengthen Netcracker's position as a leader in next-generation monetization.</p>
Buying Criteria Rating	<p>Customer Success and Stability: Leader</p> <p>Delivery Model: Leader</p> <p>Portfolio Capabilities: Leader</p> <p>Service and Support: Very Strong</p>
Product Scores	Leader



Strengths

- Netcracker embeds multi-agent AI within billing, charging, and collections, enabling intent-based configuration, leakage detection, and dispute prevention beyond some competitors' GenAI experiments.
- Netcracker reinforces its leadership in open APIs and interoperability through active contributions to TM Forum's open digital architecture and open API manifesto, while collaborating with major CSPs to align its agentic AI solution with TMF639, TMF620, and other TM Forum APIs.
- The Digital Satellite Solution is unique. Netcracker is the only top-tier BSS vendor with a packaged monetization solution for LEO, GEO, and MEO satellite operators, addressing global coverage, roaming, and hybrid service charging.

Limitations

- With cloud-native adoption rising, newer vendors offering lightweight, flexible, and cost-efficient BSS platforms attract smaller CSPs, creating competitive pressures that risk diverting business away from Netcracker's broader platform.
- Netcracker's API's are compliant with TMF/CAMARA standards, but the developer experience is less polished, with fewer self-service tools, sandboxes, or dynamic pricing experiment environments than some competitors. This can be a disadvantage in B2B2X and ecosystem plays.
- Netcracker excels in convergent charging but lacks the charging-first recognition of lean rivals, leading some CSPs to view it as broad, heavyweight, and slower, often linked with complex transformations over rapid SaaS onboarding.