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Rahul Gupta

Revenue Management: Competitive Landscape Assessment

Report Summary

Vendors are enhancing cloud-native, AI-driven monetization platforms to help CSPs support 5G, enterprise services, ecosystem monetization, and digital business models while improving automation, flexibility, and operational efficiency.

Product Class Scoreboard

Source: © 2026 GlobalData



Market Overview

Product Class	Revenue Management
Market Definition	The revenue management market comprises business support system (BSS) solutions that enable communication service providers (CSPs) to monetize connectivity, digital services, enterprise offerings, and ecosystem-based business models. Key functional areas include mediation, converged rating and charging, online and offline charging systems, customer and partner billing management, collections management, bill presentment, voucher and recharge management, policy control and charging, revenue assurance, settlement management, digital commerce, and monetization platforms. Increasingly, revenue management solutions are being integrated with customer engagement, product catalog, partner ecosystems, and AI-driven decisioning capabilities to support end-to-end monetization. Revenue management has evolved from a traditional billing and charging function into a strategic enabler of digital transformation and business growth. The emergence of 5G standalone, network APIs, private networks, IoT,

	edge computing, network slicing, B2B2X business models, and digital ecosystems is driving demand for highly flexible, cloud-native monetization platforms. Vendors are investing heavily in cloud-native architectures, microservices, SaaS delivery models, open APIs, low-code/no-code configuration tools, and AI-powered automation to enable real-time charging, dynamic pricing, personalized offers, and rapid service innovation. Revenue management platforms are increasingly expected to support diverse charging models, including subscription-based, usage-based, outcome-based, and partner-led monetization approaches. AI and generative AI (GenAI) are becoming important differentiators in the market. Vendors are embedding AI, machine learning (ML), and agentic AI capabilities into revenue management platforms to automate pricing optimization, revenue forecasting, fraud detection, dispute resolution, collections management, customer care, and operational processes. The competitive landscape includes established OSS/BSS vendors such as Amdocs, Netcracker, Ericsson, Nokia, Huawei, Oracle, and Whale Cloud, alongside specialist vendors including Cerillion, Comarch, Hansen Technologies, Nexign, Tecnotree, and others. While large vendors increasingly position revenue management as part of broader digital transformation and monetization platforms, specialist vendors often differentiate through faster deployment, cloud-native architectures, SaaS delivery models, vertical-specific capabilities, and standardized offerings targeted at mid-tier and emerging-market CSPs.
Rated Competitors	• 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	• Comarch • Cerillion • Hansen • Nexign • Tecnotree • Qvantel
Changes Since Last Update	• September 2026: Netcracker and C Spire, which is based in the US, expanded their partnership to leverage agentic AI across revenue management and customer experience operations. The initiative focuses on automating monetization processes, improving customer

	interactions, and enhancing operational efficiency through AI-driven capabilities. • August 2026: Telefonica Chile and Telefonica Moviles Chile, companies operated by Millicom in Chile, signed a multi-year managed service agreement with Amdocs. Under the agreement, Millicom's operations in Chile will leverage Amdocs's full-stack BSS and OSS, supported by AI-driven application management, operations services, and software factory expertise. • May 2026: Ishan Technologies, which is based in India, selected Oracle Communications to modernize its charging and billing environment as part of a broader digital transformation initiative. • February 2026: MasOrange selected Ericsson charging and billing evolved as part of a strategic 5G standalone core transformation program. The deployment will help unify charging operations and enable rapid monetization of new 5G-enabled services and differentiated connectivity offerings. • January 2026: Proximus selected Nokia's converged charging to modernize its charging environment and support cloud-native monetization. The transformation includes migrating the operator's fixed and mobile customer base to Nokia's charging platform to improve automation and enable future digital service innovation.
Source: GlobalData	

Market Assessment

The revenue management market has entered a new phase of evolution. While billing and charging remain foundational capabilities, CSPs increasingly view revenue management as a strategic enabler for supporting new business models rather than solely as an operational function. This transition is forcing vendors to rethink traditional approaches to monetization and deliver platforms that can support greater business agility, faster product innovation, and more sophisticated customer engagement strategies.

One of the most significant trends shaping the market is the growing convergence of charging, billing, policy control, partner management, and digital commerce capabilities. CSPs are seeking to reduce operational silos and simplify technology estates by consolidating multiple revenue management functions onto unified platforms. This trend is particularly evident among operators pursuing large-scale IT transformation programs aimed at improving operational efficiency, reducing total cost of ownership, and accelerating time-to-market for new services.

The market is also experiencing a shift in buying priorities. Historically, CSPs evaluated revenue management solutions based primarily on scalability, reliability, and billing accuracy. Today, operators are placing greater emphasis on flexibility, automation, ecosystem support, and the ability to rapidly monetize emerging services. As telecom operators expand into areas such as enterprise connectivity, private networks, IoT, financial services, and digital marketplaces, revenue

management platforms must support increasingly diverse customer segments, pricing models, and settlement requirements.

AI is becoming an important competitive differentiator across the market. Vendors are integrating AI and automation capabilities to improve operational efficiency, simplify product configuration, enhance customer interactions, and support revenue optimization initiatives. GenAI and emerging agentic AI capabilities are beginning to influence product roadmaps, with vendors exploring how autonomous systems can streamline billing operations, customer support, revenue assurance, and service lifecycle management.

Market Dynamics: The revenue management market remains highly competitive, with vendors differentiating themselves through cloud-native architectures, AI-driven automation, ecosystem monetization capabilities, and support for emerging 5G and enterprise business models. Amdocs and Netcracker continue to be among the strongest competitors in the market, benefiting from broad product portfolios, extensive Tier 1 customer bases, proven transformation expertise, and continued investments in AI-enabled monetization and digital business platforms. Huawei also remains a significant force in the market due to the maturity and completeness of its revenue management portfolio, including converged charging, billing, policy control, and AI-driven automation capabilities. Despite facing regulatory and geopolitical restrictions that limit its ability to pursue new opportunities in North America and parts of Europe, Huawei continues to demonstrate strong execution in Southeast Asia, the Middle East, Africa and some European countries. Consequently, Huawei's inclusion in the 'Leader' category is driven by the strength of its technology, product breadth, innovation, and delivery capabilities rather than its geographic reach. Ericsson and Nokia continue to leverage their strong positions in core networks, 5G, and policy control to expand their monetization offerings, with both vendors increasingly emphasizing cloud-native charging and enterprise monetization use cases. Oracle differentiates through its cloud-first strategy, integration with Oracle Cloud Infrastructure (OCI), and strong capabilities in converged charging and digital monetization. Meanwhile, Whale Cloud continues to strengthen its position in emerging markets through its cloud-native ZSmart portfolio, open ecosystem approach, and growing focus on digital business enablement.

As CSPs increasingly seek to monetize 5G, enterprise services, IoT, network APIs, and ecosystem-based offerings, competition is shifting beyond traditional billing and charging capabilities toward enabling business agility, AI-driven operations, and support for next-generation digital business models.

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:** CSPs are increasingly targeting enterprise, wholesale, IoT, and industry-specific opportunities to diversify revenue streams beyond traditional connectivity services. These business models involve complex pricing structures, partner ecosystems, usage-based charging, and settlement requirements, driving demand for advanced revenue management solutions.
- **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.
- **AI and Automation Adoption:** AI, machine learning (ML), GenAI, and agentic AI are becoming increasingly important in revenue management. CSPs are leveraging these technologies to automate billing operations, optimize pricing strategies, improve collections, reduce revenue leakage, enhance customer service, and support data-driven decision-making.

Buying Criteria

- **Customer Success & Stability:** GlobalData assesses success and stability by analysing recent financial performance, including revenue and margin performance, debt profile, and other factors that indicate corporate stability. It analyses customer success by referencing the number and diversity of revenue management customers, recent momentum with 'showcase' customers, new badges, and expanded customer relationships in 2025-26.
- **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.
- **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.
- **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.

Vendor Recommendations

- **Accelerate AI and Agentic AI Integration:** While most vendors have introduced AI capabilities, many offerings remain focused on analytics and operational automation. Vendors should move beyond basic AI use cases and develop agentic AI capabilities that can autonomously support product creation, pricing optimization, revenue assurance, collections management, dispute resolution, and customer care processes. AI should become embedded across the entire revenue lifecycle rather than existing as a standalone feature.
- **Enable API and Network-as-a-Service (NaaS) Monetization:** The emergence of network APIs and NaaS business models is creating new monetization opportunities for CSPs. Vendors should develop dedicated capabilities for API exposure, API charging, partner onboarding, settlement, and revenue-sharing processes to help operators monetize network assets more effectively.
- **Simplify Modernization and Migration Programs:** Many CSPs continue to operate multiple legacy charging and billing systems accumulated over decades. Vendors should invest in migration accelerators, automated data conversion tools, catalog transformation frameworks, and phased modernization approaches that reduce deployment risk and accelerate time-to-value. Simplifying transformation remains a critical purchasing criterion for operators.

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.
- **Modernize Legacy Revenue Management Environments:** Many CSPs continue to operate multiple charging and billing systems that have evolved over years through acquisitions, mergers, and incremental technology upgrades. Operators should develop phased modernization strategies that simplify technology estates, reduce operational complexity, and create a foundation for future digital services. Consolidating fragmented revenue management platforms can improve agility, reduce costs, and accelerate service launches.
- **Leverage AI and Automation:** CSPs should take advantage of AI, machine learning, GenAI, and agentic AI capabilities to automate revenue management processes. AI can help optimize pricing strategies, reduce revenue leakage, improve collections, enhance customer service, and streamline operational workflows. CSPs should focus on practical AI use cases that deliver measurable business outcomes.

Rated Competitors

Product Name	Netcracker Revenue Management
Current Perspective	Netcracker has emerged as one of the most comprehensive revenue management providers in the industry. Historically recognized for its convergent billing and BSS transformation capabilities, the company has significantly expanded its monetization portfolio to address the industry's shift toward AI-driven operations, enterprise monetization, partner ecosystems, and digital business models. Netcracker's strategy extends well beyond traditional charging and billing and increasingly focuses on creating a unified monetization platform spanning charging, billing, collections, settlements, revenue assurance, fraud management, payments, partner management, and AI-enabled operational automation. Netcracker's most notable strategic differentiator is its investment in agentic AI for revenue operations. The company is embedding autonomous agents across revenue management processes, including billing operations, collections optimization, fraud investigation, revenue assurance, payment reconciliation, and partner settlement management. While much of the industry remains focused on GenAI-based assistants and copilots, Netcracker is pursuing a more operationally focused vision in which AI agents execute revenue-related workflows with limited human intervention. This approach aligns closely with CSP objectives to reduce operational costs, improve accuracy, and increase automation across complex monetization environments. The company's position has been further strengthened by the completion of NEC's acquisition of CSG Systems in 2026, with Netcracker assuming responsibility for the combined business and integration strategy. The acquisition significantly expands Netcracker's footprint in North America and adds valuable capabilities in customer engagement, payments, monetization, SaaS platforms, and customer experience management. CSG brings deep expertise and long-standing relationships within the cable and broadband industry. These relationships provide Netcracker with access to customer segments where it historically had a more limited presence and create opportunities for cross-selling monetization, OSS, and AI-driven automation solutions into the cable and broadband market. Furthermore, CSG's strengths in payments, digital commerce, customer journey orchestration, and SaaS delivery complement Netcracker's traditional telecom BSS and revenue management capabilities, creating a broader and more diversified revenue platform.
Buying Criteria Rating	Customer Success and Stability: Leader Delivery Model: Leader Portfolio Capabilities: Leader Service & Support: Leader
Product Scores	Leader

	Portfolio Capabilities Leader Very Strong Strong Competitive Vulnerable Customer Success and Stability Delivery Model Service and Support Netcracker Revenue Management Product Class Average
Strengths	- Netcracker offers one of the broadest revenue management portfolios in the market, covering mediation, convergent charging, billing, collections, partner settlements, interconnect, payments, revenue assurance, fraud management, and enterprise monetization. - Netcracker has emerged as one of the industry's more aggressive adopters of agentic AI within BSS and revenue management. Its strategy extends beyond AI assistants to autonomous agents that can automate billing operations, collections, revenue assurance, fraud management, and settlement processes. - The acquisition of CSG strengthens Netcracker's revenue management proposition. CSG contributes strong SaaS capabilities, customer engagement solutions, payment platforms, and deep expertise in cable and broadband markets.
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. - While Netcracker's APIs are aligned with TM Forum and industry standards, its developer experience, self-service tooling, sandbox environments, and innovation ecosystem are still evolving. This can limit its attractiveness in highly ecosystem-centric and API-driven business models. - While the CSG acquisition significantly strengthens the combined offering, successful integration of products, go-to-market strategies, sales organizations, and customer bases will be critical. Realizing the full value of the acquisition may take several years and could create short-term organizational and product roadmap challenges.

Source: GlobalData