Vendor Profile

Netcracker's Role in Accelerating Telecom Digital Transformation in the Middle East, Türkiye, and Africa

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IDC OPINION

Telecom operators in the Middle East, Türkiye, and Africa region are accelerating their cloud and AI-led digital transformation efforts, focusing on the containerization of application stacks, aggregation of data stacks, functional workflow automation, AI-driven service operations, cloud-native and hybrid architecture automation, AI-driven service management, and cloud-native architectures to enhance operational efficiency and customer experience. As these operators look to modernize legacy business support system (BSS)/operations support system (OSS) systems, adopt AI-driven automation, and integrate services beyond the core — including digital services, IT services, and non-terrestrial network (NTN) services such as satellite connectivity solutions — technology vendors with strong cloud-native-by-design and foundational-AI capabilities for telco workloads will play a crucial role in shaping the region's telecom landscape.

Netcracker has positioned itself as a key enabler of telecom digital transformation through its Netcracker Digital Platform — incorporating its GenAI Telco Solution and Digital Satellite Solution — which addresses critical industry challenges such as network automation, service orchestration, customer engagement, and multidomain interoperability. Its AI-powered service management capabilities, along with its cloud-native and API-driven architecture, align well with operators' requirements for greater agility, scalability, cost efficiency, and hybridity given the region's emphasis on data residency and data sovereignty.

The company's regional engagements with major operators such as Etisalat by e&, du, Turkcell, and Vodafone Oman highlight its ability and versatility to support large-scale and midsize BSS transformation across brownfield and greenfield environments. This differentiates its value proposition in the marketplace, besides its go-to-market business model to undertake end-to-end delivery and execution by vendors themselves. These transformation projects demonstrate the growing appetite of the region — especially in the Middle East — for AI-enabled service delivery, data-driven customer engagement, and seamless multicloud integrations to support next-generation telecom services.

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As telecom operators in the region continue to evolve, demand for flexible, AI-powered, and cloud-driven solutions will increase as the benefits of telco stack modernization trickle down with real use cases and successful implementations. Moreover, as more operators in the region accelerate telco stack modernization — including BSS/OSS upgrades — to address their unique requirements, use-case scenarios, and operational complexities, Netcracker's focus on interoperability with existing telecom ecosystems, strategic hyperscale partnerships, and continued investment in AI-native products positions it well to support operators in navigating these industry shifts. Moving forward, demonstrating tangible AI-driven business outcomes, ensuring seamless integration across networks, and strengthening regional partnerships will be key factors in further solidifying Netcracker's market position.

IN THIS VENDOR PROFILE

This IDC Vendor Profile focuses on Netcracker's technology capabilities and track record in BSS and OSS transformation across the META region. It provides an overview of the company, highlights its cloud-native and hybrid telco solutions leveraging recent technological developments and addressing telco ecosystem challenges, and provides a summary of the deployments and initiatives in the META region. The report aims to inform IDC's regional and global subscribers — including telecom operators, IT buyers, and channel partners — about Netcracker's market position and plans.

SITUATION OVERVIEW

Company Overview and Regional Presence

Based in Waltham, Massachusetts, Netcracker Technology was founded in 1993 and has over 68 global locations. As a wholly owned subsidiary of NEC Corporation since 2008, Netcracker employs approximately 15,000 people worldwide, serving more than 250 customers.

Netcracker Technology serves key markets across the region, including the UAE, Saudi Arabia, Oman, Qatar, and Türkiye. Its regional operations are supported by a dedicated team that ensures the effective delivery of solutions. Netcracker continues to expand its presence in the region, leveraging partnerships and enhancing service capabilities to meet the evolving needs of its customers.

The company emphasizes innovation in supporting telecom operators on their transformation journeys, backed by a portfolio of patents and advanced solutions. The company invests in research and development to drive technological advancements, enabling operators to enhance efficiency, optimize customer experience, and accelerate digital transformation.

In addition to its focus on technological innovation, Netcracker engages with industry stakeholders to address critical challenges in the telecommunications sector. The company's recent participation in the Communications Sector Coordinating Council (CSCC) highlights its commitment to securing telecommunications infrastructure, aligning with its broader mission to support operators in their digital transformation while enhancing network resilience and security.

In line with the latest developments in the telecommunications ecosystem, the company has developed solutions to support telecom operators and satellite connectivity providers.

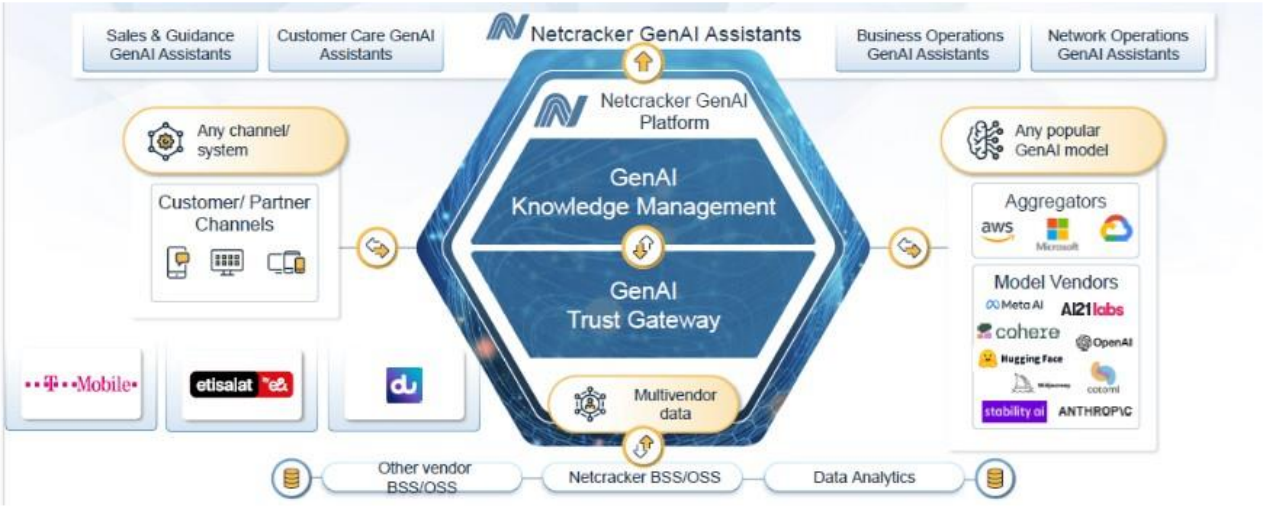
Netcracker GenAI Telco Solution

Netcracker provides a GenAI-powered platform designed to support telecom operators in developing and deploying AI-driven assistants and agents across various operational domains. The platform is built on a flexible architecture that enables seamless integration with existing BSS/OSS systems, multivendor data sources, and third-party AI models.

By leveraging its core components — GenAI Knowledge Management and GenAI Trust Gateway — the platform creates, tests, and runs GenAI agents that focus on the telecom business as well as ensures secure and efficient AI adoption across customer care, sales, business operations, and network management. Its interoperability with multiple AI vendors — including AWS, Microsoft, OpenAI, and Meta — enables telecom operators to experiment with different models and optimize AI applications based on their specific needs. The architecture of the Netcracker GenAI Platform is shown in Figure 1.

FIGURE 1

Netcracker GenAI Platform



Source: Netcracker, 2025

Netcracker's GenAI Platform is designed to address the needs of telecom operators with a vast number of AI agents and skills across various business functions, including customer care, sales, network operations, and business support. The solution is built to integrate with existing telecom IT ecosystems — including BSS/OSS systems, data analytics platforms, and third-party AI models — ensuring seamless interoperability. Additionally, the platform enables telecom operators to develop and automate AI-driven workflows through its flexible architecture. It also supports integration with multiple engagement channels such as web portals, customer service platforms, and messaging tools, allowing for enhanced interaction and automation. With advanced analytics capabilities, the platform provides telecom operators with insights into AI-driven transactions and interactions, helping optimize performance and efficiency.

Netcracker's GenAI agents drive significant efficiency gains across multiple telecom functions by automating routine tasks, enhancing decision-making, and reducing operational bottlenecks. Key performance indicators (KPIs) demonstrate measurable improvements in customer service and network operations, leading to faster issue resolution and reduced workload for human agents. For example, the Customer Care GenAI Solution enables a 35%-65% reduction in agent calls related to bill explanations. Meanwhile, the Network Operations GenAI Solution significantly reduces investigation time for digital operations technicians, cutting it from hours to just 10 to 15 seconds.

IDC believes one of the key strengths of Netcracker's GenAI Platform is its ability to seamlessly integrate with multiple AI models and synthesize data and workflows, leveraging years of experience in enabling telco workloads. This enables telecom

operators to tailor and optimize AI functionalities to their specific operational needs. The platform's GenAI-driven assistants and agents enhance existing automation and decision-making processes, complementing traditional AI capabilities with more agentic, adaptive, and context-aware intelligence.

Netcracker Digital Satellite Solution

Netcracker's Digital Satellite Solution is designed to support satellite operators, service providers, and enterprises in managing and optimizing modern satellite connectivity including software-defined low earth orbit (LEO) and geostationary orbit (GEO) satellites. The solution is built on a hybrid cloud-native architecture, integrating digital BSS and real-time OSS to enable service orchestration, automation, and operational efficiency.

With API-driven ecosystem engagement, the platform supports interoperability with existing telecom and enterprise systems, facilitating customer management, service diversity, and localization. AI-driven capabilities enhance real-time service visibility, dynamic SLA management, and automation for improved network performance.

The solution is designed to scale across distributed cloud environments, making it adaptable for various satellite use cases, including mobility, maritime, enterprise connectivity, and government applications. The architecture of the solution is shown in Figure 2.

FIGURE 2

Netcracker Digital Satellite Solution

Source: Netcracker

Netcracker's Digital Satellite Solution helps satellite operators, service providers, and enterprises manage and optimize their networks with AI-driven automation and real-time service management. The solution integrates with existing telecom and IT

systems, ensuring flexibility across terrestrial and satellite networks. By using a cloud-native and API-driven approach, it enables seamless service orchestration, enabling operators to efficiently manage customer needs, service diversity, and network performance.

The platform includes real-time, AI-powered service inventory to track satellite movement, predict network congestion, and optimize connectivity. Dynamic SLA management helps operators anticipate service issues, adjust network resources, and ensure reliable connectivity. AI-driven closed-loop automation further enhances efficiency by detecting anomalies, predicting maintenance needs, and resolving network issues with minimal manual intervention. On the business side, Netcracker's BSS capabilities support flexible pricing, automated order management, and streamlined partner collaboration, helping operators maximize revenue opportunities.

IDC sees Netcracker's Digital Satellite Solution as a strong enabler for modern LEO and multi-orbit networks, combining AI, automation, and cloud-native technology to improve operational efficiency and service reliability. Its ability to integrate with existing telecom ecosystems makes it a flexible choice for operators looking to scale satellite services for enterprise, government, and mobility applications. As demand for seamless global connectivity grows, Netcracker's solution provides a scalable and intelligent approach to managing satellite networks.

Company Strategy, Regional Customer Footprint, and Initiatives

Netcracker's strategy focuses on enabling telecom and satellite operators to accelerate digital transformation through AI-driven automation, cloud-native platforms, and open ecosystem integration. By leveraging real-time analytics, predictive automation, and flexible monetization models, the company aims to enhance network efficiency, service reliability, and business agility. Netcracker prioritizes interoperability, ensuring seamless integration with existing BSS/OSS systems, hyperscaler cloud platforms, and third-party AI solutions to support evolving industry needs. Additionally, the company continues to invest in AI, automation, and 5G-ready solutions, positioning itself as a key technology partner for operators navigating the shift toward next-generation connectivity and digital services.

Netcracker has supported the transformation journeys of several telecom operators in the Middle East, Türkiye, and Africa, enabling them to modernize operations, enhance customer experiences, and accelerate digital innovation. The following are some key collaborations in the region:

- **Etisalat by e& (BSS transformation)**. Netcracker is working with Etisalat by e& on a multiyear BSS transformation project, aiming to enhance service agility and improve digital experiences for customers. The deployment

includes a full-stack BSS replacement, enabling Etisalat by e& to streamline operations, accelerate service delivery, and support future digital and AI-driven initiatives.

- **du (GenAI use cases)**. Netcracker and du are collaborating on the development of GenAI use cases to enhance digital customer experiences by leveraging AI-driven automation and real-time insights. Announced at GITEX 2024 in Dubai, the initiative focuses on optimizing customer interactions, improving support efficiency, and integrating AI capabilities into du's existing digital infrastructure.
- **Vodafone Oman (cloud-native BSS implementation)**. Vodafone Oman deployed Netcracker's Digital BSS and AI/Data Analytics Platform as part of its BSS2Cloud initiative, enabling rapid market entry and a fully digital service model. The solution supports Vodafone Oman's customer engagement strategy by providing analytics-driven decision-making, automated service management, and seamless integration with digital channels.
- **Telecoms World Middle East 2024**. Netcracker participated in Telecoms World Middle East 2024 in Dubai to showcase how telecom operators can leverage data-driven insights to enhance customer loyalty and increase profitability. The company highlighted the role of AI and analytics in personalizing customer engagement, optimizing service offerings, and driving revenue growth.

FUTURE OUTLOOK

Netcracker is expected to continue expanding its presence in the Middle East, Türkiye, and Africa by strengthening its partnerships with regional telecom operators and enhancing its AI-driven automation and cloud-native solutions. The company's focus on BSS/OSS transformation, AI-based service management, and satellite connectivity solutions aligns with growing demand for digitalization and network efficiency in the region. With increasing investments in 5G, AI-driven customer engagement, and satellite communications, Netcracker aims to position itself as a key technology enabler for telecom operators and satcom providers looking to modernize their operations and service offerings.

Looking ahead, Netcracker's focus on interoperability, AI-driven automation, and cloud-native technologies enables it to address the evolving needs of telecom operators in the region. As operators prioritize network efficiency, service agility, and digital transformation, Netcracker's solutions provide a framework for enhancing automation, optimizing customer engagement, and streamlining service management. Continued investments in AI, analytics, and next-generation connectivity solutions will enable the company to adapt to industry shifts and support telecom operators in their long-term modernization efforts.

Advice for Netcracker

- **Expand regional partnerships and engagements.** Netcracker should continue to strengthen its partnerships with telecom operators and satellite connectivity providers across the Middle East, Türkiye, and Africa. Demonstrating successful deployments and measurable business outcomes through thought leadership, ecosystem management, media visibility, and direct customer outreach will reinforce its position as a trusted technology partner in the region. Emphasizing its end-to-end delivery capabilities and highlighting regional success stories will further solidify its value proposition.
- **Demonstrate AI-driven business value.** As AI adoption in telecom operations grows, operators will look for measurable efficiency gains and cost optimizations. Netcracker should focus on real-world use cases, proofs of concept (POCs), and customer success stories to highlight how its GenAI Telco Solution and Digital Satellite Solution improve automation, customer interactions, and network efficiency.
- **Prioritize seamless integration and open ecosystem collaboration.** With telecom operators modernizing their IT ecosystems, interoperability with existing BSS/OSS systems, hyperscaler cloud platforms, and AI models is critical. Netcracker should emphasize its open API frameworks and multivendor compatibility to ensure smooth transitions for operators adopting cloud-based and AI-driven architectures. Expanding collaboration with hyperscalers, systems integrators, and managed service providers will further enhance its solution scalability.
- **Leverage growth in satellite connectivity.** Increasing demand for hybrid satellite-terrestrial connectivity presents a significant opportunity. Netcracker should strengthen partnerships with satellite operators and telecom providers to support enterprise, mobility, and government applications. Positioning its Digital Satellite Solution as a scalable and automation-driven network management platform will help address emerging connectivity needs.
- **Drive industry education and operator readiness.** To accelerate AI adoption, Netcracker should engage operators through workshops, advisory sessions, and collaborative industry forums. Helping operators understand the long-term benefits of AI, automation, and cloud-native solutions will drive confidence in digital transformation initiatives and solidify Netcracker's position as a trusted technology partner.

LEARN MORE

Related Research

- *Top 5 Trends in Telecommunications Digital Services and Monetization to Watch in 2025* (IDC #US53175925, February 2025)
- *Netcracker Digital Satellite Solution Addresses Unique Challenges of Emerging Multi-Orbit Satellite Communications* (IDC #lcUS52351424, June 2024)
- *A Review of EMEA Telecom Customer Experience Platforms* (IDC #EUR151531124, March 2024)
- *Core Use Cases for Generative AI in Telcos* (IDC #EUR151410923, December 2023)
- *Key Trends in EMEA Telecoms: Winners, Losers, and Best Practices* (IDC #EUR149756822, October 2022)

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