

Cloud OSS BSS - Company Evaluation Report, 2025

Market Report | 2025-08-01 | 142 pages | MarketsandMarkets

AVAILABLE LICENSES:

- Single User \$2650.00
- Corporate License \$4250.00

Report description:

The Cloud OSS BSS Companies Quadrant is a comprehensive industry analysis that provides valuable insights into the global market for Cloud OSS BSS. This quadrant offers a detailed evaluation of key market players, technological advancements, product innovations, and emerging trends shaping the industry. MarketsandMarkets 360 Quadrants evaluated over 100 companies, of which the Top 23 Cloud OSS BSS Companies were categorized and recognized as quadrant leaders.

The global cloud OSS/BSS market is gaining momentum as it enables communication service providers (CSPs) to evolve into comprehensive digital service providers (DSPs) by delivering a superior omnichannel customer experience through cloud-enabled support systems. With the advent of new technologies, traditional OSS/BSS solutions are being replaced by modern digital cloud-based alternatives that offer seamless connectivity for telecom and mobile operators. These solutions support automated service fulfillment, enhance customer experience, accelerate service delivery, lower operational costs, and improve overall productivity and efficiency. The ongoing demand for evolving customer expectations has compelled CSPs to upgrade their infrastructure in order to manage networks and customer-focused services, leading to the adoption of modern OSS/BSS systems. Cloud OSS/BSS is reshaping the service offerings of communication service providers (CSPs). By leveraging cloud platforms, the telecommunications sector can better address both business and technical challenges. This adoption enables CSPs to respond more rapidly, reduce operational expenses, scale their operations as needed, and improve resource sharing, automation, and system monitoring.

The 360 Quadrant maps the Cloud OSS BSS companies based on criteria such as revenue, geographic presence, growth strategies, investments, and sales strategies for the market presence of the Cloud OSS BSS quadrant. The top criteria for product footprint evaluation included By COMPONENT (Solutions, Services), By CLOUD TYPE (Public Cloud, Private Cloud, Hybrid Cloud), and By OPERATOR TYPE (Mobile Operator, Fixed Operator).

Key players in the Cloud OSS BSS market include major global corporations and specialized innovators such as Amdocs, Salesforce, NEC, Huawei, Ericsson, Oracle, CSG, HPE, Nokia, ZTE, Comarch, IBM, Optiva, Mavenir, STL, Hughes, Comviva, Whale Cloud, Tecnotree, Subex, Cerillion, Infovista, and TEOCO. These companies are actively investing in research and development, forming strategic partnerships, and engaging in collaborative initiatives to drive innovation, expand their global footprint, and maintain a competitive edge in this rapidly evolving market.

Top 3 Companies

Amdocs

Amdocs is a leader in the Cloud OSS BSS market, holding a significant market share. The company offers a comprehensive suite of

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

digital BSS, service orchestration, and cloud-native monetization solutions, supporting telecom operators through multi-cloud environments. Amdocs emphasizes dynamic policy control, 5G monetization, and real-time customer experience, bolstered by its integration capabilities with Tier-1 telecom operators worldwide. Their strategic focus on AI operations, API frameworks, and DevOps methodologies enables them to reduce operational complexities and foster innovation, ensuring relevance in the evolving telecom ecosystem.

Salesforce

Salesforce is another key player, leveraging its strengths in CRM, customer engagement, and AI-driven process automation. The company's Telecom Cloud platform offers CSPs tools for customer lifecycle management within a cloud-native environment. Salesforce has bolstered its offerings through strategic acquisitions, such as Vlocity, enhancing its ability to deliver customized BSS solutions. The company's rapid deployment models and process-centric designs help telecom providers improve agility and customer outcomes.

NEC

NEC, through its Netcracker subsidiary, captures a considerable market share with its end-to-end orchestration capabilities. The company's cloud-native portfolio spans digital BSS and service assurance, supporting functionalities like network slicing and automated lifecycle management. NEC is recognized for executing complex transformation projects and investing in AI-led assurance, positioning them as a vital participant in the cloud OSS BSS landscape.

Table of Contents:

1	INTRODUCTION	12
1.1	MARKET DEFINITION	12
1.2	INCLUSIONS AND EXCLUSIONS	12
1.3	STAKEHOLDERS	13
2	EXECUTIVE SUMMARY	14
3	MARKET OVERVIEW AND INDUSTRY TRENDS	18
3.1	INTRODUCTION	18
3.2	MARKET DYNAMICS	18
3.2.1	DRIVERS	19
3.2.1.1	Increasing adoption of tailored cloud OSS BSS solutions	19
3.2.1.2	Increasing 5G adoption to surge demand for cloud OSS BSS	20
3.2.1.3	Growing demand for convergent billing systems	21
3.2.1.4	Large-scale implementation of SDN and NFV	21
3.2.1.5	Growing need to reduce CAPEX and OPEX	21
3.2.2	RESTRAINTS	21
3.2.2.1	Concerns over data privacy hindering adoption of solutions	21
3.2.3	OPPORTUNITIES	22
3.2.3.1	Adoption of cloud technologies to transform telecom industry	22
3.2.3.2	Growth of telecom industry with next-generation operation systems and software framework	22
3.2.3.3	Operators taking service innovation to next level for monetizing and marketing IoT	22
3.2.4	CHALLENGES	23
3.2.4.1	High volume of customer transactions and increasing complexities in network management	23
3.2.4.2	Lack of technical proficiency for implementing cloud-native OSS BSS solutions	23
3.3	BRIEF HISTORY OF CLOUD OSS BSS	24
3.4	ECOSYSTEM ANALYSIS	25
3.5	VALUE CHAIN ANALYSIS	27
3.5.1	SOLUTION PROVIDERS	27
3.5.2	CONNECTIVITY PROVIDERS	27
3.5.3	SYSTEM INTEGRATORS	28

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

3.5.4	SERVICE PROVIDERS	28
3.5.5	END USERS	28
3.6	TECHNOLOGY ANALYSIS	28
3.6.1	KEY TECHNOLOGIES	28
3.6.1.1	Artificial intelligence and machine learning	28
3.6.1.2	Microservices and Cloud Native Architectures	28
3.6.1.3	Digital Twin	29
3.6.2	ADJACENT TECHNOLOGIES	29
3.6.2.1	Software-defined Networking	29
3.6.2.2	Network Function Virtualization	29
3.6.2.3	Multi-access Edge Computing	29
3.6.3	COMPLEMENTARY TECHNOLOGIES	29
3.6.3.1	DevOps and Continuous Integration/Continuous Deployment	29
3.6.3.2	Cybersecurity Solutions	30
3.6.3.3	Open APIs and Interoperability Standards	30
3.7	PATENT ANALYSIS	30
3.7.1	METHODOLOGY	30
3.8	TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESS	34
3.9	PORTER'S FIVE FORCES ANALYSIS	35
3.9.1	THREAT OF NEW ENTRANTS	36
3.9.2	THREAT OF SUBSTITUTES	36
3.9.3	BARGAINING POWER OF SUPPLIERS	36
3.9.4	BARGAINING POWER OF BUYERS	36
3.9.5	INTENSITY OF COMPETITIVE RIVALRY	37
3.10	KEY CONFERENCES AND EVENTS IN 2025-2026	37
3.11	TECHNOLOGY ROADMAP FOR CLOUD OSS BSS MARKET	38
3.11.1	CLOUD OSS BSS ROADMAP TILL 2030	38
3.11.1.1	Short-term roadmap (2025-2026)	39
3.11.1.2	Mid-term roadmap (2027-2028)	39
3.11.1.3	Long-term roadmap (2029-2030)	39
3.12	IMPACT OF AI/GENERATIVE AI ON CLOUD OSS BSS MARKET	40
3.12.1	USE CASES OF GENERATIVE AI IN CLOUD OSS BSS	40
4	COMPETITIVE LANDSCAPE	42
4.1	OVERVIEW	42
4.2	KEY PLAYER STRATEGIES	42
4.3	REVENUE ANALYSIS, 2020-2024	44
4.4	MARKET SHARE ANALYSIS, 2024	45
4.5	COMPANY VALUATION AND FINANCIAL METRICS	47
4.6	BRAND/PRODUCT COMPARISON	48
4.7	COMPANY EVALUATION MATRIX: KEY PLAYERS, 2025	49
4.7.1	STARS	49
4.7.2	EMERGING LEADERS	50
4.7.3	PERVASIVE PLAYERS	50
4.7.4	PARTICIPANTS	50
?		
4.7.5	COMPANY FOOTPRINT: KEY PLAYERS, 2025	51
4.7.5.1	Company footprint	51

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

4.7.5.2	Regional footprint	52
4.7.5.3	Component footprint	53
4.7.5.4	Cloud type footprint	54
4.7.5.5	Operator type footprint	55
4.8	COMPANY EVALUATION MATRIX: STARTUPS/SMES, 2025	56
4.8.1	PROGRESSIVE COMPANIES	56
4.8.2	RESPONSIVE COMPANIES	56
4.8.3	DYNAMIC COMPANIES	56
4.8.4	STARTING BLOCKS	56
4.8.5	COMPETITIVE BENCHMARKING	58
4.8.5.1	Detailed list of key startups/SMEs	58
4.8.5.2	Competitive benchmarking of key startups/SMEs	59
4.9	COMPETITIVE SCENARIO AND TRENDS	59
4.9.1	NEW PRODUCT LAUNCHES AND ENHANCEMENTS	59
4.9.2	DEALS	64
5	COMPANY PROFILES	70
5.1	MAJOR COMPANIES	70
5.1.1	AMDOCS	70
5.1.1.1	Business overview	70
5.1.1.2	Products/Solutions/Services offered	71
5.1.1.3	Recent developments	72
5.1.1.3.1	Product launches and enhancements	72
5.1.1.3.2	Deals	73
5.1.1.4	MnM view	73
5.1.1.4.1	Key strengths/Right to win	73
5.1.1.4.2	Strategic choices	74
5.1.1.4.3	Weaknesses and competitive threats	74
5.1.2	SALESFORCE	75
5.1.2.1	Business overview	75
5.1.2.2	Products/Solutions/Services offered	76
5.1.2.3	Recent developments	77
5.1.2.3.1	Product launches and enhancements	77
5.1.2.3.2	Deals	77
5.1.2.4	MnM view	78
5.1.2.4.1	Key strengths/Right to win	78
5.1.2.4.2	Strategic choices	78
5.1.2.4.3	Weaknesses and competitive threats	78
	?	
5.1.3	NEC	79
5.1.3.1	Business overview	79
5.1.3.2	Products/Solutions/Services offered	80
5.1.3.3	Recent developments	81
5.1.3.3.1	Product launches and enhancements	81
5.1.3.3.2	Deals	82
5.1.3.4	MnM View	83
5.1.3.4.1	Key strengths/Right to win	83
5.1.3.4.2	Strategic choices	83

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

5.1.3.4.3	Weaknesses and competitive threats	83
5.1.4	ERICSSON	84
5.1.4.1	Business overview	84
5.1.4.2	Products/Solutions/Services offered	85
5.1.4.3	Recent developments	86
5.1.4.3.1	Product launches and enhancements	86
5.1.4.3.2	Deals	87
5.1.4.4	MnM view	87
5.1.4.4.1	Key strengths/Right to win	87
5.1.4.4.2	Strategic choices	88
5.1.4.4.3	Weaknesses and competitive threats	88
5.1.5	ORACLE	89
5.1.5.1	Business overview	89
5.1.5.2	Products/Solutions/Services offered	90
5.1.5.3	Recent developments	91
5.1.5.4	MnM view	93
5.1.6	HUAWEI	94
5.1.6.1	Business overview	94
5.1.6.2	Products/Solutions/Services offered	94
5.1.6.3	Recent developments	95
5.1.6.3.1	Product launches and enhancements	95
5.1.6.3.2	Deals	96
5.1.7	HPE	97
5.1.7.1	Business overview	97
5.1.7.2	Products offered	98
5.1.7.3	Recent developments	99
5.1.7.3.1	Product launches and enhancements	99
5.1.7.3.2	Deals	100
5.1.8	OPTIVA	101
5.1.8.1	Business overview	101
5.1.8.2	Products offered	102
?		
5.1.8.3	Recent developments	102
5.1.8.3.1	Product launches and enhancements	102
5.1.8.3.2	Deals	103
5.1.9	NOKIA	104
5.1.9.1	Business overview	104
5.1.9.2	Products offered	105
5.1.9.3	Recent developments	107
5.1.9.3.1	Product launches and enhancements	107
5.1.9.3.2	Deals	107
5.1.10	CSG	108
5.1.10.1	Business overview	108
5.1.10.2	Products offered	109
5.1.10.3	Recent developments	110
5.1.10.3.1	Product launches and enhancements	110
5.1.10.3.2	Deals	110

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

5.1.11	ZTE	111
5.1.11.1	Business overview	111
5.1.11.2	Products offered	112
5.1.11.3	Recent developments	113
5.1.11.3.1	Product launches and enhancements	113
5.1.12	COMARCH	114
5.1.12.1	Business overview	114
5.1.12.2	Products/Solutions/Services offered	114
5.1.12.3	Recent developments	115
5.1.12.3.1	Product launches and enhancements	115
5.1.12.3.2	Deals	115
5.1.13	SUBEX	116
5.1.14	TEOCO	117
5.1.15	IBM	118
5.1.16	INFOVISTA	119
5.1.17	COMVIVA	120
5.1.18	CERILLION	121
5.1.19	WHALE CLOUD	122
5.1.20	HUGHES	123
5.1.21	MAVENIR	124
5.1.22	STL	125
5.1.23	TECNOTREE	126
5.2	STARTUP/SMES PLAYERS	127
5.2.1	BILL PERFECT	127
5.2.2	TELG005	128
5.2.3	NMSWORKS SOFTWARE	129
5.2.4	WAVELO	130
5.2.5	CHIKPEA	130
5.2.6	BLUECAT	131
5.2.7	KENTIK	132
5.2.8	KNOT SOLUTIONS	133
6	APPENDIX	134
6.1	RESEARCH METHODOLOGY	134
6.1.1	RESEARCH DATA	134
6.1.1.1	Secondary data	135
6.1.1.2	Primary data	136
6.1.2	MARKET FORECAST	137
6.1.3	STUDY ASSUMPTIONS	138
6.1.4	RESEARCH LIMITATIONS	139
6.2	COMPANY EVALUATION MATRIX: METHODOLOGY	139
6.3	AUTHOR DETAILS	142

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Cloud OSS BSS - Company Evaluation Report, 2025

Market Report | 2025-08-01 | 142 pages | MarketsandMarkets

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User	\$2650.00
	Corporate License	\$4250.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-09"/>
		Signature	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com