Magic Quadrant for AI in CSP Customer and Business Operations

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This Magic Quadrant helps communications service providers identify and evaluate AI vendors for their customer and business operations. It will guide CSP CIOs and technology leaders toward the right AI vendor choices in a rapidly evolving market.

Market Definition/Description

Gartner defines the market of AI in communications service provider (CSP) customer and business operations as commercial off-the-shelf (COTS) products. They are either capabilities embedded in CSP-specific operational technology (OT) applications (such as channels, CRM and other business support system [BSS] applications) or industry-agnostic horizontal applications delivering AI/machine learning (ML)-based customer and business operations in CSPs. CSP customer and business operations refer to marketing, sales, customer acquisition, customer journey, billing and revenue management, revenue assurance, and related risk management. The scope of AI products covers data readiness, life cycle management of algorithms and their application to CSP customer and business operations.

AI in CSP customer and business operations helps CSPs utilize AI/ML to generate insights and automate business processes across various customer and business operations areas. These areas include marketing, sales, configure-price-quote (CPQ), order management, product management, billing and revenue management, customer journey and care, revenue assurance, and fraud/risk management. Examples include intelligent chatbots utilizing natural language processing for customer interaction use cases to automate call

center operations. These products assist with insights and automation and help CSPs manage the life cycle of AI/ML algorithms, gradually enabling ModelOps/AIOps.

Mandatory Features

- Product/service component for data readiness (such as data collection, data cleansing, processing, metatagging and distribution).

- Product component for algorithm development (development of algorithms for CSP customer and business operations as mentioned in the Market Definition and the Purpose Summary).

- Product component for algorithm version control

- Product component for algorithm life cycle management (management of algorithms for training, efficiency, relevance and retirement).

- Product component for data application and output (application of AI models for one or more use cases in CSP customer and business operations).

- At least one of the functional capabilities listed in the "Common Features" (that is, the functional capability of marketing and sales, use cases in CSPs/customer journey, use cases in CSPs/revenue management and use cases in CSPs).

The service component of the mandatory features can be delivered by the vendor or through a partner company.
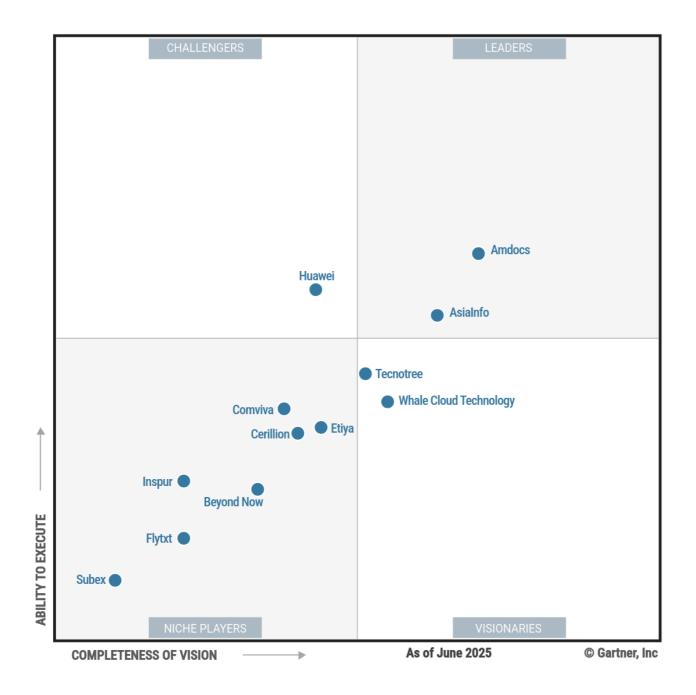
Common Features

- Marketing and sales (such as content customization, personalized ads, ML-based CRM, lead generation, send-time optimization, cross-sell/upsell marketing, and dynamic campaign management and recommendations).

- Customer journey (such as customer acquisition, customer care, unassisted order flows, and service desk and contact-center-related operational use cases).

- Revenue management (such as personalized tariff planning, pricing, discounting, billing, security and regulatory compliance, and fraud/risk management and revenue assurance).

- Professional services around AI/ML consulting, implementation and related services.

Magic Quadrant

Figure 1: Magic Quadrant for AI in CSP Customer and Business Operations

Figure 1: Magic Quadrant for AI in CSP Customer and Business Operations. As of June 2025. © Gartner, Inc

Vendor Strengths and Cautions

Amdocs

Amdocs is a Leader in this Magic Quadrant. Headquartered in the U.S., it provides communications service providers (CSPs) with a business support system (BSS) and services for various customer and business operations globally. It also offers operation support

system (OSS) and network solutions and services. The vendor's customers include many Tier-1 CSPs across major markets. It has a multifaceted AI approach involving products, data, partnerships and services for supporting CSP customer and business operations.

Strengths

- Amdocs has wide expertise and experience in the BSS and OSS domain (along with advanced integration capabilities). The vendor influences CSPs' customer and business operations through the application of various AI and machine learning (ML) technologies in many use cases.

- Amdocs provides a telco-specific data model that is especially useful for CSPs to process telco-specific data and gain targeted insights.

- Amdocs continues to leverage its partnerships with NVIDIA, Microsoft, Amazon Web Services (AWS), Google and Snowflake to provide an environment to its CSP customers that supports multiple large language models (LLMs). The vendor also has a strong patent portfolio to support its innovations.

Cautions

- Amdocs offers limited tooling for model monitoring, drift detection, retraining and algorithm life cycle management. It offers some tools through partners (for example, version control), which may not meet the requirements of some CSPs.

- The market adoption of AI assistants and AI agents is evolving rapidly, with the distinction between the two being a gray area. Amdocs' AI agent offering (Bill Agent) and AI assistant offering (Bill Inquirer) provide similar capabilities, which can be confusing to some CSPs.

- Amdocs depends on a partner ecosystem, and this limits its ability to offer effective dynamic pricing to customers.

AsiaInfo

AsiaInfo is a Leader in this Magic Quadrant. Based in China, it is a multinational provider of telecom software solutions. It offers CSPs a wide range of OSS and BSS solutions. AsiaInfo has successfully scaled its solutions in China, accommodating a large subscriber base and big transaction volumes. The company's success in the Chinese market is mostly due to its diversified product portfolio, which has modules supporting various use cases and maintains a balance between classic AI and generative AI (GenAI).

Strengths

- Unlike some providers that use third-party or other generic platforms to develop CSP-specific products, AsiaInfo uses domain-specific LLMs to develop strong CSP AI products (such as AISWare). This supports deep alignment with BSS and OSS applications and targets hyperautomation.

- AsiaInfo offers more flexibility to CSPs in solution customization compared with its counterparts. It also provides CSP-specific releases, deployment models, flexible pricing and commercial models. Working with Chinese CSPs at an unmatched scale and dealing with their highly complex requirements has led AsiaInfo to further enhance its products and services.

- The vendor extensively invests in R&D and holistically partners with other leading technology providers, CSPs, industry bodies and academia. It announced and released several AI-native solutions (such as AI-native BSS solutions and several digital intelligence products and solutions) for its customers during 2024 and has won several awards for its solutions.

Cautions

- Although AsiaInfo operates in emerging Asia/Pacific and Europe markets, its major operations continue to be in China and mostly focus on large CSPs. CSPs in other regions and smaller CSPs in China may find it difficult to get support from AsiaInfo.

- CSP CIOs outside China may not readily get access to adequate local language support for their customer and business operations, affecting their time to market.

- AsiaInfo depends on local sales agents and channel partners for its operations outside China. The vendor lacks personnel (such as developers, architects and solution experts) for ground operations outside China, making it difficult for non-Chinese CSPs to get holistic support.

Beyond Now

Beyond Now is a Niche Player in this Magic Quadrant. Based in Austria, it provides SaaS-based BSS, digital marketplace and ecosystem orchestration platforms. Its Beyond Now Wave AI Suite integrates GenAI and ML into its platforms. The vendor has a presence in Europe and North America. With a SaaS-based offering, the vendor is able to minimize integration-related challenges CSPs face.

- Beyond Now offers flexible pricing approaches, including a SaaS subscription model (bundled as part of overall platform capabilities), revenue share model (aligning costs with business outcomes and service revenue) and scope-based AI packaging (based on use cases and add-ons).

- Beyond Now's AI product is preintegrated into its platform, which makes the deployment easier without the need for technical setups and various integrations.

- Beyond Now has planned its AI use-case portfolio to align with various business functions within the CSP organization (such as product managers, customer support and developers), making it easier to adopt.

Cautions

- Beyond Now does not have a widespread global distribution, with customers mostly in Europe, and has a limited presence in North America. CSPs in other regions may find it difficult to leverage its AI capabilities.

- Beyond Now Wave AI Suite is a relatively new product in the market (launched in December 2023). Thus, it has limited customer feedback and track record, making it less visible to CSP CIOs and more difficult for them to make an informed decision.

- Beyond Now's customer deployments are fewer compared to other vendors for a few use cases. This would offer limited support to CSPs aiming for wider automation and autonomous operations.

Cerillion

Cerillion is a Niche Player in this Magic Quadrant. Based in the United Kingdom, it operates as a product company, providing a single, preintegrated BSS/OSS suite for all customers. Cerillion has implementations of its AI products in Europe, Africa and Latin America. The vendor has plans for developing a Cerillion proprietary LLM and currently supports a bring-your-own model approach for public LLMs. Another investment area includes building its first AI agents for high-volume customer service use cases.

Strengths

- Cerillion offers a unified product suite with AI features fully embedded with low-code/no-code adaptability, enabling customers to immediately use the technology without

specific AI expertise or complex integration. Its model supports standards-based integration (open APIs/open digital architecture [ODA]) and SaaS delivery.

- The solution unifies diverse service types (mobile, fixed, broadband, TV, digital content), payment methods (prepaid, postpaid), customer segments (B2C, B2B) and business models (wholesale, retail, multicountry). This convergence aids customers in growing revenue through innovative service bundles and streamlining business operations.

- Cerillion's API-first architecture allows new AI features, such as "bill intelligence," to be developed and made available across various channels like CRM Plus, Self Service or Mobile App. This provides faster time to market and a consistent experience across channels.

Cautions

- The preintegrated nature of its suite, while positioned as a strength for faster delivery and end-to-end automation within its solution, can be perceived as a weakness by some CSPs and/or their integrator partners. Cerillion's AI features are not available as stand-alone products.

- The vendor's current approach for GenAI features, such as those in Cerillion Enterprise Product Catalogue, is a bring-your-own model in which users source their own LLMs (e.g., ChatGPT, Claude, Gemini, Azure AI) and configure them. This means CSPs are responsible for procuring and managing their own LLM accounts and API keys, which could introduce additional overhead, costs or data governance issues for the CSP.

- Cerillion is investing in developing and training its own private LLM based on open-source models. This means a more comprehensive, in-house AI capability for sensitive data, complex use cases or specific needs is still under development and yet to be offered.

Comviva

Comviva is a Niche Player in this Magic Quadrant. It is based in India. Apart from fintech solutions, it provides products and services supporting CSP customer and business operations. Its BlueMarble product suite supports BSS, and its MobiLytix product suite supports AI features. Comviva is serving CSPs in many emerging markets of Asia/Pacific, Africa and the Middle East and is attempting to expand into Europe and North America. The vendor focuses on AI implementation in marketing, sales, loyalty, content management and monetization within CSP customer and business operations.

Strengths

- Comviva's MobiLytix suite is used by several CSPs in emerging markets as a customer value management (CVM) improvement solution through churn prediction, personalized messaging and next best action recommendations. Further, its natural language processing (NLP)-based chatbot paired with NGAGE, a communication platform as a service, is used by CSPs for customer interactions.

- Comviva has built a strong data analytics foundation for the AI product suite covering ML models, a GUI-based workbench, a no-code application and models' life cycle management. These capabilities are well-integrated into many of its marketing, sales, BSS and other applications, and offer quick wins for data-driven monetization and retention initiatives.

- The vendor has partnered with AWS, Microsoft Azure, IBM, Teradata, Oracle, Cloudera Hadoop and Google Cloud Platform (GCP), and has a strong presence in Africa, the Middle East and Asia/Pacific regions, supporting a variety of CSPs.

Cautions

- Unlike some vendors in this Magic Quadrant, Comviva lacks participation in global AI standards or consortia and has limited academic and research partnerships and patents on leading-edge AI algorithms.

- Comviva's AI applications are mostly concentrated around CVM, marketing, loyalty and sales, and offer limited help to CSPs focusing on broader autonomous operations.

- Comviva is yet to scale its products and services to meet the CSP needs in developed markets. Therefore, prospective customers in these markets would require a proof of concept to find out if the vendor is aligned with their operational environments.

Etiya

Etiya is a Niche Player in this Magic Quadrant and is based in Türkiye. It provides BSS solutions to CSPs along with well-embedded AI solutions and a workflow automation engine and services for its customer and business operations requirements. The vendor provides AI agent capabilities to enhance customer experience. Its CSP customers are largely in Europe, the Middle East and Africa and some are in Asia and North America. Apart from these regions, the vendor is also focusing on Latin America.

Strengths

- Etiya's products help improve the customer's time to market since they are integrated with NLP, ML, predictive analytics and digital twin modeling through APIs. These products can be personalized, offer real-time insights and have intelligent self-service options.

- Etiya's as-a-service solutions are specifically built for CSPs interested in "greenfield" solutions and those launching digital brands, as well as mobile virtual network operators. Its services include algorithm life cycle management that enables CSPs to create, train, validate, deploy, monitor and retire predictive models.

- The vendor has a good focus on a wide range of KPIs selected to influence efficiency, cost and customer experience, and a roadmap to enhance the outcome for CSPs.

Cautions

- Etiya has a limited global footprint compared with some other vendors in this Magic Quadrant. This can lead to constraints in global delivery, supporting localization and undertaking large transformational projects involving multiple locations.

- Etiya's AI deployments are still limited compared to other vendors in this Magic Quadrant. CSPs looking for AI models with proven business KPIs across large customer bases may find Etiya less mature.

- The vendor lacks a robust system-integrator-partner network and regional delivery partners, which can lead to delivery risks or delays in integration in complex multivendor environments.

Flytxt

Flytxt is a Niche Player in this Magic Quadrant and is based in the Netherlands. It offers AI and automation solutions for marketing and CVM for multiple industry verticals, including CSPs. It focuses on enterprise customer experience and omnichannel marketing workflows. NEON-dX, Flytxt's flagship Omni-channel CVM Automation product, offers a variety of AI-driven use cases. Its history with marketing and customer lifetime value (CLV) management enables the vendor to offer CSPs with a CLV data model and packaged solutions. Flytxt's CSP clients are mostly in the Middle East and Africa, although the vendor is scaling its client base in Latin America.

Strengths

- NEON-dX Omni-channel CVM platform is an AI-enabled solution that includes a recommendation engine, GenAI and explainability support, and it offers several use cases (e.g., churn prediction, next best offer (NBO), segment discovery and campaign optimization).

- Flytxt has specialized expertise in AI implementations for use cases across specific domains such as product management, digital commerce, marketing, sales, customer service and privacy management in diverse markets.

- It offers easy-to-subscribe, API-based access to its AI product for a variety of use cases associated with customer experience and omnichannel marketing, and it uses subscription pricing as a commercial model.

Cautions

- Flytxt has limited expertise and experience considering the overall scope of its CSP customer and business operations. For example, it doesn't have experience with use cases associated with billing, fraud management and revenue assurance.

- Flytxt is a relatively small vendor, with fewer B2B implementations, that predominantly operates in the Middle East and Africa and has limited visibility in other regions, especially Europe. It also has a limited revenue base that depends on specialized and productized use-case-based products.

- The vendor has limited partnerships and capabilities with data readiness and managing the full life cycle of AI algorithms for its customers. Flytxt may not be the best fit for CSPs looking for comprehensive products and services or broader AI use cases for BSS.

Huawei

Huawei is a Challenger in this Magic Quadrant. It is based in China and offers network appliances, computing systems, software and services to CSPs and other industries. Huawei's BSS solutions focus on intelligent, automated operations across CSP customer operations and business processes. It emphasizes open APIs for integration flexibility. Use cases include AI-driven CRM (configure, price and quote [CPQ], campaign, order and sales), billing, digital assistants, CX management, AI contact centers, multirole AI agents and monetization of new business cases. Huawei's umbrella LLM series Pangu covers both generic and industry-specific models, including telecommunications.

Strengths

- Huawei is an influential player in the communications industry and actively collaborates with standards organizations. It also offers AI applications across a wide range of use cases, including multirole agentic support. Hence, it is capable of adding substantial value to CSP customer and business operations.

- Huawei has a strong position in China due to its Pangu umbrella LLM series. In addition to LLM-based functionalities in its BSS solutions, Huawei has developed an industry-specific LLM for the telecommunications industry.

- Huawei's extensive R&D team, coupled with its global professional services arm, delivers prompt response to CSP's AI-related demand.

Cautions

- Huawei offers a "modular packages" approach and supports traditional licensing (with an emphasis on service offerings as modules), SaaS and associated professional services. Alternative pricing options are available; however, the level of flexibility depends on the deal.

- Huawei's AI offerings focus on embedding AI capabilities and features across its products (Huawei BSS, CBS AICC, etc.,) and associated tooling to adapt these capabilities. This may not align with CSPs seeking a common, shared and single AI framework across their multivendor wider IT and BSS estate focused on customer and business operations.

- Huawei focuses on embedding AI capabilities into its products and supports model management tools that help adjust AI models, but has limited direct algorithm development tools for CSP customers. This approach may not align with CSPs looking for end-to-end custom AI development, and management.

Inspur

Inspur is a Niche Player in this Magic Quadrant. It is a Chinese IT software and services provider specializing in BSS and OSS solutions for CSPs. Its AI offerings include intelligent campaign management, advanced CRM, conversational AI and electronic know-your-customer (eKYC) solutions — each powered by the Inspur AI platform — Yunrui. This platform facilitates AI-enabled BSS use cases through integrated model development and life cycle management. It adopts a model-as-a-service approach, seamlessly connecting with Inspur's BSS suite. Inspur primarily caters to small and midsize CSPs in the Middle East and Africa.

Strengths

- Strategic partnerships with Huawei and DeepSeek provide Inspur with enhanced industry expertise, advanced market insights and access to the latest developments in GenAI.

- Inspur employs a modular approach, delivering its AI solutions through prepackaged and preoptimized models, thereby offering clients flexibility and scalability in deploying additional use cases.

- Inspur's comprehensive AI platforms support toolchain for AI models and agents development, which can enable the vendor to regularly develop and test additional use cases swiftly.

Cautions

- Outside of China, Inspur's client base for CSP AI solutions is primarily concentrated in the Middle East and Africa, resulting in limited brand visibility in other major markets, notably Europe and Southern Asia.

- The Inspur AI platform is not a commercial solution, which limits the features to preoptimized AI solutions and use cases that cater to broader and more common CSP requirements. Thus, it may not be suitable for clients seeking tailored use cases.

- Though Inspur plans to extend its AI support in the future, its current AI capabilities are limited, with the BSS suite predominantly focusing on marketing and sales functions.

Subex

Subex is a Niche Player in this Magic Quadrant. Based in India, it provides AI and analytics solutions to CSPs. Its specialties include revenue assurance, fraud management, ecosystem management and asset management. It also offers solutions to challenges such as handset theft, SIM box fraud, subscription fraud, calling line identification (CLI) spoofing and mobile money fraud. Its products, including Business Assurance and Fraud Management, offer customizable plug-and-play solutions, and its HyperSense AI platform allows clients to create tailored AI applications. It has customers in Asia/Pacific, Europe, the Middle East, Africa and Latin America.

Strengths

- Subex's HyperSense AI studio, with its drag-and-drop AI algorithm development, streamlines AI adoption for customers, making it simpler to incorporate AI into their operations.

- Subex's HyperSense product portfolio delivers AI-powered solutions for various telecom use cases, particularly in fraud management, highlighting its dedication to enhancing innovation and AI integration in this area of telecom operations.

- Subex's extensive experience in fraud and asset management in the communications sector enables it to make a significant impact on customer interactions for CSPs by leveraging various AI technologies in these domains.

Cautions

- Subex has consistently posted net losses in its 2023 and 2024 financial results (financial years ending 31 March 2024 and 31 March 2025, respectively), suggesting persistent financial difficulties that could affect its operations and future growth plans.

- Subex's relatively smaller support team and insufficient partnership approaches may restrict its service and support effectiveness as well as its global growth in the telecom AI market.

- Subex encounters difficulties in the telecom AI market because of the absence of a defined marketing and sales strategy. This affects its competitive position.

Tecnotree

Tecnotree is a Visionary in this Magic Quadrant and is headquartered in Finland. It aims to remodel CSP operations by leveraging AI to streamline business processes, increase efficiency and enhance customer satisfaction. It mostly operates in Latin America, Middle East and Africa and offers AI-native platforms like Moments Mutli Experience, Sensa and Certifai, which are integrated with TM Forum Open APIs to facilitate personalization, CVM, loyalty and monetization.

Strengths

- Tecnotree provides AI and data capabilities, including model development life cycle support, with a focus on model metrics, trust and governance. Certifai delivers AI explainability, fairness, model governance and regulatory readiness, aligning with regulations like the EU AI Act.

- Tecnotree offers customer engagement with GenAI-driven customer experience and agent assistance tools that blend conversational AI with customer intent interpretation and real-time recommendations.

- Tecnotree's solutions offer flexible deployments, are model agnostic and provide AIOps support. Its AI stack is aligned with TM Forum Open APIs and ODA, which helps reduce integration efforts.

Cautions

- Tecnotree's presence has been largely confined to Latin America, the Middle East and Africa. As it expands in the U.S. and Europe, currently, CSPs in these developed markets may not find sufficient customer references within their own regions. This can impact Tecnotree's perception in these markets.

- Tecnotree has a strong focus on AI use cases in marketing and sales, and customer journey in emerging markets. Therefore, it has less visibility in other areas within customer and business operations.

- The current user experience for campaign management and analytics is described as more functional than design-led, which can result in experiencing dashboards as "too technical" for business marketing users.

Whale Cloud Technology

Whale Cloud Technology is a Visionary in this Magic Quadrant. Headquartered in China, the vendor delivers an end-to-end AI platform, WhaleDI AI. It's AI in CSP customer and business operations clients are in China and emerging markets in Asia/Pacific and the Middle East. Its AI platform offers prebuilt AI scenarios to the CSPs, aiming at accelerated digital transformation and time to market. It offers centralized management of models (in-house and third party) with containerized deployments.

Strengths

- Whale Cloud Technology's WhaleDI AI platform offers an integrated solution combining GenAI (WhaleLLM), predictive AI (50+ ML models) and perceptive AI (100+ algorithms). This platform facilitates agile delivery and orchestration, and ensures data security via localized private model deployment.

- The vendor aims to enhance CSP customer experience through a variety of AI-driven tools, including AI predictive models for deep customer understanding (e.g., churn prediction) and AI-driven virtual and agent assistants for humanlike interactions round the clock and reduced resolution times. It also has AI capabilities for analyzing omnichannel customer journey data to optimize touchpoints.

- Whale Cloud Technology's BSS and OSS are preintegrated with its AI platform that includes over 30 AI use cases for marketing, sales and commerce, revenue monetization and business intelligence. The vendor also provides an intelligent knowledge base and AI agent management for workflow orchestration as well as a digital marketing cloud that uses AI for personalized marketing automation.

Cautions

- With the majority of its AI revenue originating from China and the remainder mainly from emerging countries in Asia/Pacific, Whale Cloud Technology shows limited experience with Tier-1 CSPs in developed markets outside China.

- Whale Cloud Technology's AI deployments primarily focus on marketing, sales and customer journey use cases, potentially overshadowing broader AI applications in customer and business operation, such as revenue and fraud management.

- Whale Cloud Technology's AI-ready data development approach requires broader CSP participation to continuously enrich the capabilities and expand the range of AI use cases. Hence, they may not be feasible as stand-alone modules and may need significant collaboration from the CSPs for optimization.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

The following vendors were added to this Magic Quadrant:

- Beyond Now

- Cerillion

- Etiya

- Inspur

Dropped

No vendors were dropped from this Magic Quadrant.

Inclusion and Exclusion Criteria

Inclusion Criteria

To qualify for inclusion in this Magic Quadrant, providers must have AI in CSP customer and business operations for customers located in a minimum of two Gartner-defined geographical regions.

Region: Europe

- **Country of interest:** Austria, Belgium, Czech Republic, Denmark, Finland, France, Germany, Greece, Hungary, Ireland, Italy, the Netherlands, Norway, Poland, Portugal, Spain, Sweden, Switzerland and the U.K.

- **Rest of:** Albania, Andorra, Armenia, Belarus, Bosnia and Herzegovina, Bulgaria, Croatia, Cyprus, Estonia, Georgia, Iceland, Kosovo, Latvia, Liechtenstein, Lithuania, Luxembourg, Malta, North Macedonia, Moldova, Montenegro, Romania, Russia, Serbia, Slovakia

Region: Emerging Asia/Pacific

- **Country of interest:** India, Indonesia, Malaysia and Thailand

- **Rest of:** Afghanistan, Bangladesh, Bhutan, Brunei, Cambodia, Democratic People's Republic of Korea, East Timor, Fiji, Guam, Kazakhstan, Kiribati, Kyrgyzstan, Laos, Maldives, Micronesia, Mongolia, Myanmar, Nepal, Pakistan, Papua New Guinea, the Philippines, Samoa, Solomon Islands, Sri Lanka, Tajikistan, Tonga, Turkmenistan, Tuvalu, Uzbekistan, Vanuatu and Vietnam

Region: The Chinese mainland

- **Territory/location/country of interest:** China, Hong Kong and Taiwan

Region: Japan

- **Country of interest:** Japan

Region: Latin America

- **Country of interest:** Argentina, Brazil, Chile, Colombia and Mexico

- **Rest of:** Anguilla, Antigua and Barbuda, Aruba, Bahamas, Barbados, Belize, Bermuda, Bolivia, Cayman Islands, Costa Rica, Cuba, Dominica, Dominican Republic, Ecuador, El Salvador, French Guiana, Grenada, Guatemala, Guyana, Haiti, Honduras, Jamaica, Martinique, Netherlands Antilles, Nicaragua, Panama, Paraguay, Peru, Puerto Rico, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines, Suriname, Trinidad and Tobago, Uruguay, Venezuela and Virgin Islands

Region: Mature Asia/Pacific

- **Country of interest:** Australia, New Zealand, Singapore and South Korea

Region: Middle East and Africa

- **Country of interest:** Israel, Saudi Arabia and Türkiye

- **Rest of:** Algeria, Azerbaijan, Bahrain, Egypt, Iran, Iraq, Jordan, Kuwait, Lebanon, Libya, Mauritania, Morocco, Oman, Qatar, Sudan, Syria, Palestinian Authority, Tunisia, United Arab Emirates and Yemen

Region: North America

- **Country of interest:** Canada and the U.S.

Region: Sub-Saharan Africa

- **Country of interest:** South Africa

- **Rest of:** Angola, Benin, Botswana, Burkina Faso, Burundi, Cameroon, Cape Verde, Central African Republic, Chad, Comoros, Congo Brazzaville, Cote d'Ivoire, Democratic Republic of Congo, Djibouti, Equatorial Guinea, Eritrea, Ethiopia, Gabon, Gambia, Ghana, Guinea, Guinea-Bissau, Kenya, Lesotho, Liberia, Madagascar, Malawi, Mali, Mauritius, Mozambique, Namibia, Niger, Nigeria, Reunion, Rwanda, Sao Tome and Principe, Senegal, Seychelles, Sierra Leone, Somalia, Eswatini, Tanzania, Togo, Uganda, Zambia and Zimbabwe

The providers also should have added at least two net new CSP logos (commercial deployments) in calendar year 2024 for AI in CSP customer and business operations. In

addition, providers should be offering products that apply to at least one critical capability in at least two use cases, which are listed below.

Critical Capabilities:

- Billling

- Campaign management

- Churn prediction

- Content generation and personalization

- CPQ

- Cross-sell/upsell marketing

- Customer acquisition

- Customer care

- Customer segmentation

- Discounting

- Fraud and risk management

- Lead generation

- Revenue assurance

- Tariff planning and pricing

Use Cases:

- Customer journey

- Marketing and sales

- Revenue management

Exclusion Criteria

Vendors were not excluded for not responding to Gartner presurveys, for missing Gartner presurvey deadlines or for declining to respond to Gartner presurveys. In such cases,

Gartner analysts looked for data (AI product and implementation in CSP customer and business operations) in the public domain. Vendors were only included if the data in the public domain clearly and sufficiently provided information on vendors' product play in the market. However, even then, the accuracy of our research may be limited due to reliance solely on public domain data.

Vendors who did not respond to Gartner surveys were excluded only when data in the public domain did not clearly and sufficiently provide information on the vendor's product play in this market (including market vision with respect to product strategy, business strategy, GTM strategy and customer feedback).

Evaluation Criteria

Ability to Execute

Product or Service: This category focuses on the product's capabilities and evolution. Key aspects include the present status of the product to support both legacy and new requirements of CSPs. This category also focuses on vendors' provision of capabilities such as algorithm development, version control, life cycle management, and applications. Vendors' focus on interoperability, and assessment of product strengths and weaknesses is also considered.

Overall Viability: This category assesses the product's market acceptance and sustained investment. It includes the product's acceptance in the market over the last year. It also includes sustained investments in the product and its evolution.

Sales Execution/Pricing: This category covers the commercial aspects of the product. It looks at a well-defined sales and pricing approach.

Market Responsiveness and Track Record: This category evaluates customer satisfaction and feedback. It assesses the track-record of customer satisfaction and customer feedback.

Marketing Execution: This category focuses on how the vision is translated into market recognition. It includes assessment of proven examples of translating vision into industry recognition and customer mind share.

Customer Experience: This category directly addresses the customer's journey and satisfaction. It considers customer success stories and feedback.

Operations: This category looks at regulatory adherence and structural divisions. It includes adhering to technology and country-specific regulations.

Table 1: Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product or Service	High
Overall Viability	Medium
Sales Execution/Pricing	Medium
Market Responsiveness/Record	High
Marketing Execution	High
Customer Experience	High
Operations	Low

Source: Gartner (August 2025)

Completeness of Vision

Market Understanding: This category assesses the vendor's comprehension of market dynamics and end-user needs. It considers clarity of end-user challenges and priorities in this market, how their demands are changing and what use cases they are likely to focus on. It also considers the understanding of the vendor's own weaknesses and shortcomings and its plan to mitigate those.

Marketing Strategy: This category evaluates the effectiveness and clarity of the vendor's marketing approach. It considers clarity of vision and completeness of strategy for targeted markets. It also considers vendors' approaches to competitive differentiation.

Sales Strategy: This category examines the vendor's sales approach across various market segments and channels. It considers sales strategy covering various market segment requirements. It also considers the use of sales channels and their effectiveness.

Offering (Product) Strategy: This category assesses the clarity and direction of the product roadmap and its applicability. It considers clarity in the product strategy, including completeness and differentiation in the product roadmap.

Business Model: This category looks at the partnerships and overall operational framework of the vendor. It considers clarity of business and delivery model along with a partner ecosystem strengthening the delivery model.

Innovation: This category evaluates the vendor's approach to and success in innovation. It considers vendors' approaches to innovate and proven instances of innovation yielding results. It also considers vendors' thought leadership in this market segment.

Geographic Strategy: This category assesses the vendor's plans and execution regarding market expansion across different regions. It considers clarity of focus on various geographical markets and roadmap for the future.

Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	Medium
Marketing Strategy	High
Sales Strategy	Medium
Offering (Product) Strategy	High
Business Model	Medium
Vertical/Industry Strategy	NotRated

Evaluation Criteria	Weighting
Innovation	Medium

Source: Gartner (August 2025)

Quadrant Descriptions

Leaders

Leaders are equipped with ample ability to support a number of AI use cases in CSP customer and business operations. They have been achieving this consistently and have also delivered significant product innovation and capability to meet the market requirements.

Challengers

Challengers have strong market execution capabilities and good solutions, but, overall, their products lack the breadth and depth of Leaders' offerings. Their solutions do not indicate a clear vision for how the market is evolving, and they are not as innovative or advanced as those of Leaders.

Visionaries

Visionaries demonstrate a clear understanding of the market and provide key innovative elements that are illustrative of the market's future. However, they either lack the ability to influence a large part of the market, have not yet fully expanded their product capabilities to meet the global CSP demands or have limited global reach.

Niche Players

Niche Players tend to offer products that focus on a particular segment of the market or a subset of functionality. They also tend to be more specialized with regard to technology and products. This can be an advantage because CSPs aligned with the focus of Niche Players can find these vendors' offerings very suitable.

Context

This Magic Quadrant evaluates vendors that meet the inclusion criteria for the AI in CSP customer and business operations market. However, Gartner recommends further market exploration.

To have an assessment of the market, Gartner advises:

- Evaluate multiple (at least two) AI vendors providing AI in CSP customer and business operations to ensure continuity of operations. However, ensure that these vendors support integration in case of multivendor deployments.

- Analyze the AI vendors on their willingness to work with all business unit stakeholders to ensure smooth operations, data availability and security.

- Review Gartner Market Guides for Revenue Management and Monetization, and Customer Management and Experience Solutions for additional vendors that might not have met the inclusion criteria for this Magic Quadrant, but offer AI in their solutions for customer and business operations.

Market Overview

AI offerings for the CSP customer and business operations market comprise a wide range of solution providers. The services range from specialized solutions to a wider set of solutions, including additional features such as security and data storage.

The market has remained steady over the last year, and Gartner broadly classifies the AI market for CSP customer and business operations into the following three categories:

- **Revenue management:** AI can help organizations optimize their billing and pricing strategies. It can also help identify potential revenue leaks and any suspicious invoices.

- **Customer journey:** AI can analyze customer data, identify patterns and, accordingly, make recommendations. AI can also automate customer-service-related tasks, such as responding to the customer and predicting future demands and needs.

- **Marketing and sales:** AI can identify and help the marketing and sales team with potential customers. It can also help with personalization of messages (as required) and predict customer buying patterns/behaviors on the basis of conversations, interactions and other contextual insights.

GenAI continues to be a key focus in these initiatives, with CSP exploring new use cases and opportunities for improving efficiency. Additionally, CSPs are increasingly paying attention to agentic AI and exploring its use in their operations.

⊕ Evaluation Criteria Definitions