

Market Landscape: Core Vendors – 2026

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Contents

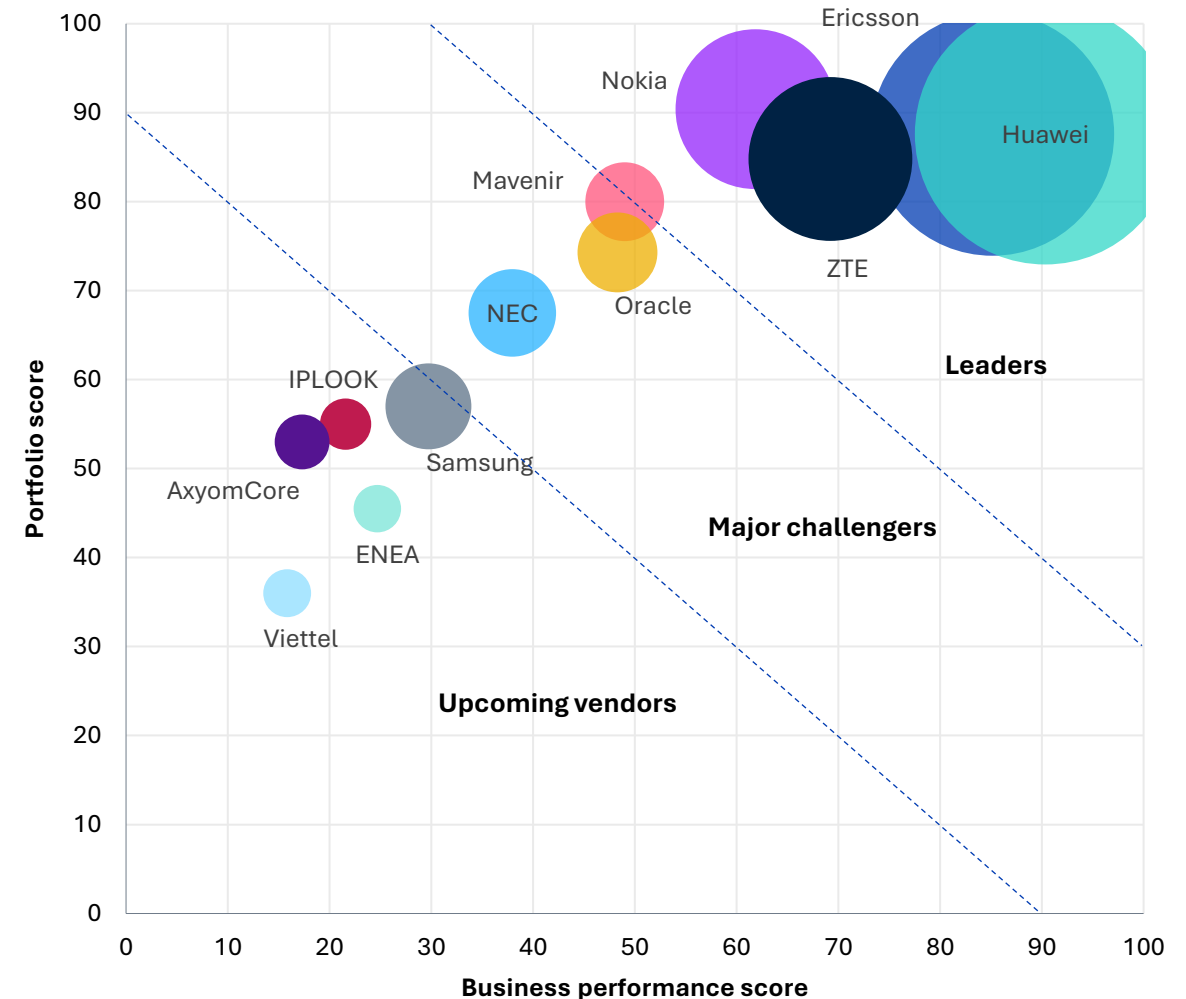
- Summary 3
- Methodology 10
- Business performance 13
- Portfolio assessment 19
- Conclusion 26
- Appendix 28

Summary

Summary (1/6)

- Five vendors control the 4G and 5G core market with a combined market share of 86.1% in 2025, down from 87.4% in 2024. The top three players collectively captured 70.9% of total revenue. With such a concentration of market power, each vendor is increasingly focused on asserting leadership, particularly as competition intensifies around the next-generation 5G core. However, measuring market leadership in this space has its challenges.
- Omdia considered two dimensions, business performance and portfolio, and categorized 12 core vendors into three groups: market leaders, major challengers, and upcoming vendors.
- All vendors belong to the same group as in the 2025 edition. There are four leaders: Ericsson, Huawei, Nokia, and ZTE. Mavenir, NEC, and Oracle are major challengers. The positions of two vendors, NEC and Oracle, have diminished slightly, so they have moved further away from the leaders' group, while Mavenir moved closer to the leaders' group.
- Huawei ranked first in business performance and second in portfolio, Nokia was first in portfolio score, Ericsson ranked second in both dimensions, and ZTE was third in both dimensions.
- Samsung Electronics and four players including the new participant, AxyomCore, are in the upcoming vendors group. However, caution is required when benchmarking these vendors, given the relatively fewer network functions (NFs) that they develop and their smaller market reach compared with the larger players.
- The scores indicate the relative position of each vendor. For example, if a vendor has a lower portfolio score in the 2026 edition than in the 2025 edition, it does not mean that this vendor's offering is weaker in 2026 than it was in 2025 but that its portfolio has not improved at the same pace as those of other vendors.

Overall core vendor positioning



Notes: Bubble size corresponds to the 2025 core revenue for each vendor.
Source: Omdia

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Summary (2/6)

Summary of categories, score weight, and top three vendors per category

Dimensions and categories	Score weight	#1	#2	#3
Business performance	100	Huawei	Ericsson	ZTE
Total core revenue market share	40	Huawei	Ericsson	ZTE
5G share of total core revenue	15	NEC	ZTE	Huawei, Oracle
5G core deals with CSPs	30	ZTE	Huawei	Ericsson
New logos	15	Ericsson	IPLOOK, Mavenir, ZTE	Huawei
Portfolio breadth and competitiveness	100	Nokia	Ericsson, Huawei	ZTE
Core portfolio breadth	20	More than five vendors with maximum score		
Cloud-native maturity	25	Ericsson, Huawei, Nokia	Mavenir, ZTE	NEC
Signaling	15	Huawei, Nokia	Ericsson, ZTE	Mavenir, Oracle
Automation	15	Huawei, Nokia	Ericsson, ZTE	Mavenir, NEC
Core as a service	10	NEC, Nokia	Ericsson, ZTE	Mavenir
AI/ML and analytics	10	Huawei, Nokia	Ericsson, ZTE	Mavenir, Oracle
Other network functions	5	Ericsson, Nokia	Huawei, ZTE	Mavenir, NEC

Source: Omdia

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Summary (3/6)

Summary of leaders

Vendor	Summary
Huawei	Huawei is the leader in the business performance dimension. It has the highest market share and ranks second for the number of 5G core deals with CSPs and third in the 5G share of total core revenue and new logos categories. Huawei is the runner-up in the portfolio dimension and is coleader in several subcategories. Huawei remains a consistently strong performer across most segments with co-leadership in key areas such as cloud-native maturity, signaling, automation, and AI/ML and analytics. Nonetheless, the vendor has opportunities to further strengthen its position in key strategic growth categories such as core-as-a-service adoption and to expand its commercial footprint.
Ericsson	Ericsson ranks second in the business performance dimension, where it leads the number of new logos, and ranks second in total core revenue market share category and third in the number of 5G deals with CSPs. Ericsson is the runner-up in the portfolio dimension, and it is the co-leader in two categories: cloud-native maturity and other network functions category.
Nokia	Nokia is the leader in the portfolio dimension. It is co-leader across the categories, and its strengths include cloud-native maturity, signaling, automation, core as a service, and AI/ML and analytics. A slight market share loss in 2025 and fewer 5G deals with CSPs in 2026 than in 2025 led to a degradation of the vendor’s business performance score.
ZTE	ZTE ranks third in the two dimensions. The vendor has made good progress in both business performance and portfolio since it first entered the leaders tier in 2023. The company leads in the number of 5G deals with CSPs and ranks second in 5G share of total core revenue and the number of new logos categories in 2026. ZTE has a strong portfolio and ranks second in several categories, such as cloud-native maturity, signaling, core as a service, automation, and AI/ML and analytics .

Source: Omdia

Summary (4/6)

Summary of major challengers

Vendor	Summary
Mavenir	Mavenir improved its business performance and ranks second in the number of new logos category. It also improved its portfolio scores in 2026 compared with 2025 and has a mature portfolio of cloud-native NFs. Mavenir ranked second in the cloud-native maturity category and third in several other portfolio categories, such as signaling, automation, core as a service, AI/ML and analytics and other network functions. The combined effect is that Mavenir moved slightly more into the leader’s tier.
Oracle	Oracle slightly improved its portfolio score and ranks third in the signaling and AI/ML and analytics categories. Oracle saw a slight decline in its business performance due to lower 5G deal numbers with CSPs and new logos compared with its competitors. However, Oracle ranked third in the 5G share of total core revenue category. Oracle’s 5G core strategy remains tightly focused on select NF categories, notably routing and selection, policy and charging, and analytics and automation. Given this targeted approach, we should be cautious when benchmarking Oracle’s portfolio against that of larger vendors that develop all core NF capabilities. For key functions such as the packet core, which Oracle does not develop in-house, the company relies on partnerships with other players. Additionally, Oracle’s 5G core is available in the Oracle Cloud. However, the vendor faces opportunities for growth in core-as-a-service offerings.
NEC	NEC focuses on a limited number of NFs. Nonetheless, it has made good progress in terms of business performance, where its strength lies in the 5G share of total core revenue category. However, it gained fewer 5G deals with CSPs than in 2025 than in 2024. Its activities are limited mainly to its home market in Japan, which automatically reduces its addressable market. NEC also focuses on the enterprise market with its core network, which is where its strength in core as a service lies. Nonetheless, NEC improved its portfolio score and was ranked third in several categories including cloud-native maturity, automation, and other network functions. NEC has scope to strengthen its capabilities in signaling and AI/ML and analytics.

Source: Omdia

Summary (5/6)

Summary of upcoming vendors (1/2)

Vendor	Summary
Samsung	Samsung improved its portfolio score from 2025 to 2026. Samsung focuses on the packet core NFs only and therefore does not have its own signaling, policy, charging for CSPs, or a core-as-a-service solution. We should be cautious when benchmarking its solutions against those of the larger vendors that develop all core NF capabilities. Furthermore, Samsung is absent from entire regions, which automatically reduces its addressable market and both potential revenue and deals. Samsung could move into the major challengers' tier once it wins more 5G deals with CSPs, grows market share, and develops in categories where it is currently lacking.
IPLOOK	IPLOOK improved its business performance and its portfolio dimension score in 2026. It is a provider of 4G and 5G core solutions, including packet core for CSPs, MVNOs, and private networks. This last is its largest market; however, for the purpose of this study, the focus is on its CSP deals and activities. IPLOOK's strengths lie in cloud-native maturity but also, to a lesser degree, core as a service and automation.
AxyomCore	AxyomCore is a new addition in this year's report. The vendor develops 4G and 5G core networks functions, where for 5G it has focused mainly on the packet core, such as access and mobility management function (AMF), session management function (SMF), and user-plane function (UPF) in addition to network repository function (NRF) and network slice selection function (NSSF) network functions. AxyomCore ranks well in the portfolio dimension given its limited scope and could improve its business performance score once it wins more 5G deals with CSPs, grows market share, and develops in categories where it is currently lacking.

Source: Omdia

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Summary (6/6)

Summary of upcoming vendors (2/2)

Vendor	Summary
ENEA	ENEA improved its score in both the business performance and portfolio dimensions. It increased the number of 5G deals with CSPs in 2026 from 2025. Unlike the leading vendors, ENEA provides only a few core NFs, which include 5G N6 GiLAN, policy control function (PCF), subscriber data management (SDM), and unified data repository (UDR). Nonetheless, it ranks relatively well on cloud-native maturity and overall automation.
Viettel	Viettel ranks well in the portfolio dimension given its limited scope. It develops 4G and 5G packet core NFs; network exposure functions (NEFs), NRF, NSSF, and SDM; and policy for the Viettel Group. Furthermore, it has developed a converged charging system in one platform to support all generations. Viettel will improve its position if it wins more 5G deals with other CSPs.

Source: Omdia

Methodology

Methodology (1/2)

- The core network as covered by Omdia in this report includes only software. Services and other solutions in other network domains, such as radio access networks (RANs) and transport networks, are not included.
- This report focuses on seven categories in the portfolio section for which vendors were sent a detailed questionnaire. These responses were then converted into measurable and comparable metrics, using the information provided by vendors themselves rather than the analyst's or a third party's perceptions and opinions. Omdia also underlines some of the key caveats associated with the metrics that are used so the reader is aware of limitations where they exist.
- We selected two main dimensions for this evaluation: the core business performance and the core portfolio breadth. Each dimension is assessed by looking at different categories and metrics. Metrics have different priorities for different vendors, and what one vendor perceives as important (specific geography, technology, or type of product) may not be as important to other vendors.
- For business performance, the categories are the global packet core revenue market share, the 5G share of each vendor's total core revenue, the number of 5G commercial deals with CSPs, and the number of new logos.
- For the portfolio dimension, Omdia took several subcategories into consideration, such as the portfolio breadth (the categories of core NFs), cloud-native maturity, signaling, automation, core as a service, policy and charging for 5G core, and AI/ML and analytics. Details for each category and their weighting in the total score are introduced in relevant sections of the report.
- A caveat to this methodology is that the business performance score is largely based on revenue from evolved packet core (EPC) and 5G packet core, but the portfolio score is based on a broader scope.

Methodology (2/2)

- The performance of solutions is another critical point of differentiation, but Omdia does not have the tools or resources to conduct lab or field tests to measure performance.
- In this 2026 report, we made small changes in the methodology and only slightly modified the weighting for some subcategories to reflect market trends and operators' priorities. The core portfolio breadth weight was reduced from 25 to 20, and the AI/ML and analytics weight was increased from 5 to 10 points. The cloud-native readiness category was renamed *cloud-native maturity*, and the policy and charging category was renamed *other network functions*.
- Price competitiveness is critical when an operator selects a vendor, but pricing information is highly confidential and specific to each client and each project.
- Patent portfolios and contributions to standards are other interesting metrics, but claims from different vendors tend to be contradictory, and comparisons are difficult. We also believes that these criteria are not as important as those included in this assessment. Essential patents matter, but Omdia argues that they are important for other reasons, not so much when it comes to assessing a vendor's position and competitiveness.
- AxyomCore was a new entrant in this 2026 report. A survey questionnaire was sent to 11 other vendors. Those were ENEA, Ericsson, Huawei, IPLOOK, Mavenir, NEC, Nokia, Oracle, Samsung, Viettel, and ZTE. More vendors could be included in future editions of this report, and the door remains open for their participation.

Business performance

Business performance

Summary of categories, score weight, and top three vendors per category

Dimensions and categories	Score weight	#1	#2	#3
Total core revenue market share (2025)	40	Huawei	Ericsson	ZTE
5G share of total core revenue (2025)	15	NEC	ZTE	Huawei, Oracle
5G core deals with CSPs	30	ZTE	Huawei	Ericsson
New logos	15	Ericsson	IPLOOK, Mavenir, ZTE	Huawei
Total business performance	100	Huawei 90/100	Ericsson 85/100	ZTE 69/100

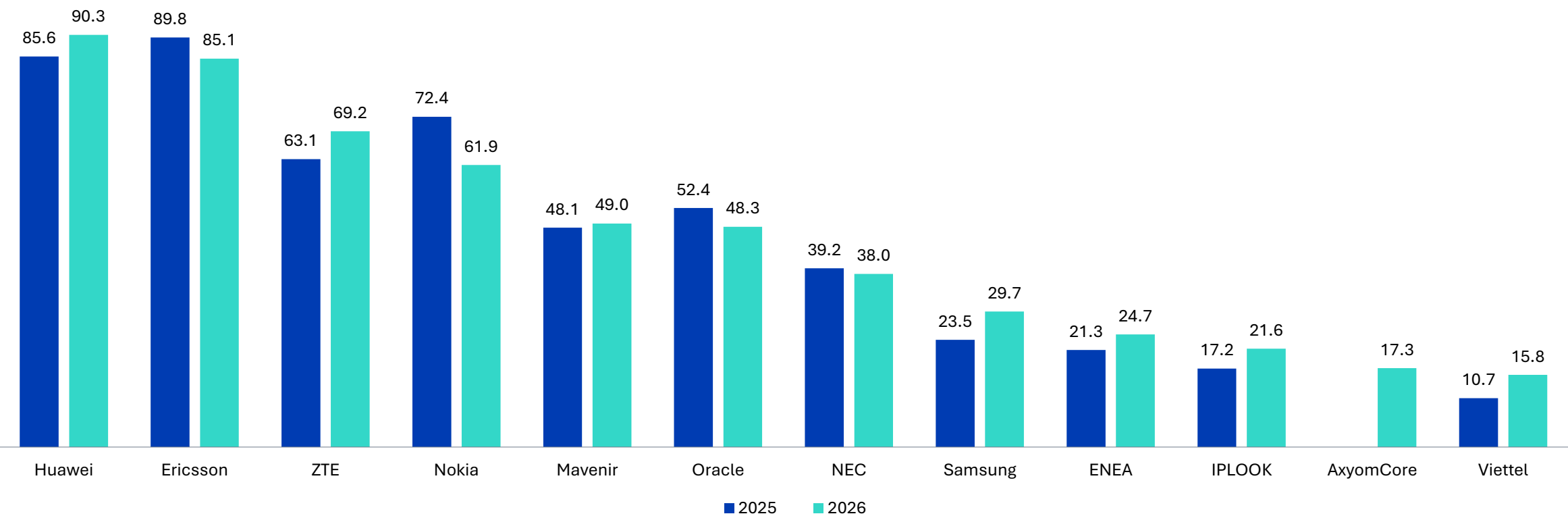
- There are some caveats to basing leadership totally on market share, but market share is important and a generally accepted way of measuring market leadership. Of all categories across the two dimensions considered in this report, market share carries the largest weight (40% of the business performance score and 20% of the grand total).
- We use revenue for market share because revenue is the most common indicator of business performance. The revenue market share shows a company’s scale, its business momentum, and its ability to win new business.
- Omdia also looks at the number of commercial 5G core deals with CSPs (excluding free trials, non-revenue-generating activities, and non-CSP deals). If a vendor has several 5G contracts with the same operator in the same country, it is counted only once, but in the case of multicountry deals with one telecom group (e.g., Vodafone Portugal and Vodafone Germany), each country counts as one deal.
- Omdia considers the number of deals to be less important than revenue in assessing leadership and, therefore, applies a smaller weighting to deals when calculating scores. Not all deals are equal: a deal with a Tier 1 operator in a big country tends to be worth more in monetary value than several deals with Tier 2 and Tier 3 operators in smaller countries.
- Nonetheless, deals are another indication of a vendor’s reach and capacity to win requests for proposals (RFPs) and, more broadly, of its business momentum, so deals are worth looking at.
- Huawei was the leader in business performance in 2026 with a score of 90/100 and was followed by Ericsson (85/100) and ZTE (69/100).

Source: Omdia

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Business performance scores, 2025 and 2026

Business performance scores (maximum 100 points)



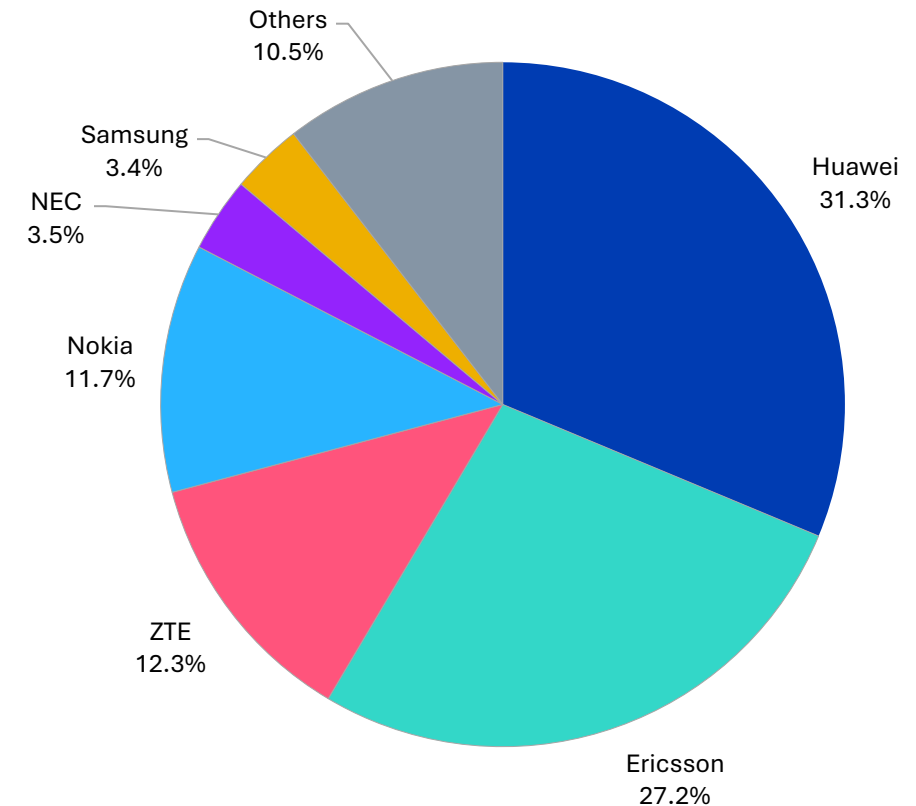
Notes: Scores are relative. If a vendor has a lower score than in the previous edition, it does not mean that this vendor's performance was necessarily weaker than before but that the status of each vendor relative to the others has changed.
Source: Omdia

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Revenue market share

- In 2025, Huawei was the market leader. It was followed by Ericsson, ZTE, Nokia, NEC, and Samsung Electronics.
- Ericsson, Huawei, and ZTE captured a combined 70.9% of global core revenue in 2025, up from 68.3% in 2024. When Nokia and NEC are added, these top five companies generated 86.1% of total core revenue in 2025, up from 87.4% in 2024. This is very high but still less than the 95.4% captured by these vendors in 2020, which indicates that upcoming vendors are collectively gaining market share.
- Huawei gained 5.0 percentage points in share thanks to a more favorable geographical mix and market share gains in emerging markets. Ericsson, ZTE, and Nokia, however, lost share.
- Market share remains an important component of vendor strategy. Some vendors deliberately trade short-term margins for increased share, leveraging competitive pricing to secure new business, especially within the 5G core space, which presents fresh monetization opportunities. Conversely, others may prioritize margin protection over top-line growth, consciously sacrificing share to maintain profitability. A single vendor may use both approaches depending on the geography, project scope, or timing.
- For 4G and 5G core revenue, Omdia does not include CSPs' spending in NF virtualization infrastructure (NFVi) or server and management software.
- Market shares also determine the size of the bubbles on the summary chart on slide 4. Omdia provides extensive market share data and analysis on a quarterly basis in its *Mobile Infrastructure Core Market Tracker* report series (see **Appendix**).

Market shares for combined 4G and 5G core in 2025



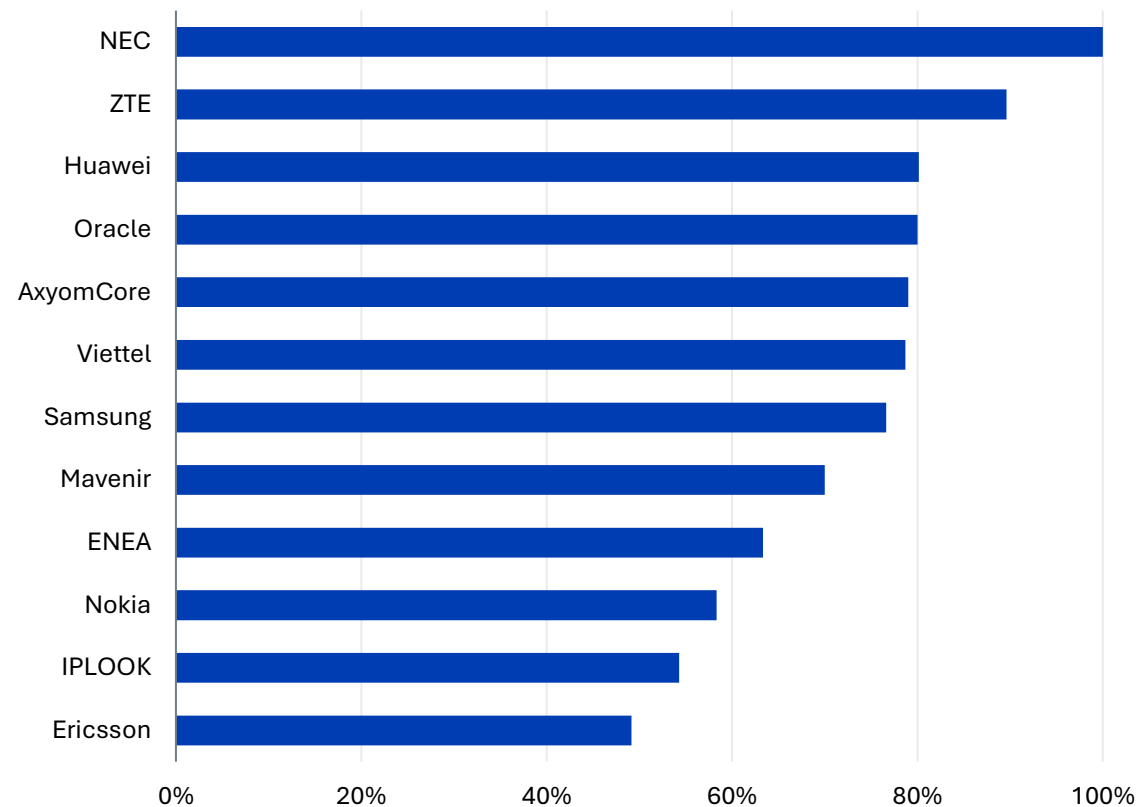
Source: Omdia

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5G share of total core revenue

- To complement the revenue market share analysis on slide 16, Omdia also considers the share of 5G as a percentage of each vendor's total core revenue in 2025. (Please note, this is not vendor 5G core market share.)
- A dollar or yuan from the sale of 4G software is worth the same as a dollar or yuan from the sale of 5G software; nonetheless, we and many of our readers consider 5G revenue to be a relevant indicator of a vendor's commercial momentum and how fast the vendor can shift its revenue mix toward 5G, that is, the fastest (and only) growing segment of the core market. It is worth noting that products initially deployed for 4G EPC can often be upgraded to 5G via software. Revenue allocation may vary from one vendor to another.
- Vendors' 5G share was higher in 2025 than in 2024, reflecting the continued momentum of 5G core deployment. As more CSPs adopt multi-vendor strategies for their 5G core networks, opportunities are expanding for a wider range of vendors to secure component-level deals beyond the packet core.
- This metric largely depends on each vendor's revenue geographical mix. NEC benefited from the strong 5G business in its domestic market, Japan; ZTE similarly benefited from 5G deployments in China. Both were early 5G-adopting countries where most investment has already shifted from 4G to 5G. Huawei has also climbed to third position this year given the focus on 5G core deployment projects.
- By contrast, vendors such as Ericsson and Nokia operate with a more diversified client base and revenue mix, spanning both advanced and late-adopter 5G core markets. This broader footprint tends to dilute percentage-based metrics. However, their global presence across developed and emerging markets offers clear advantages in other dimensions such as total core revenue and deal volume.

5G share of total vendor core revenue, 2025

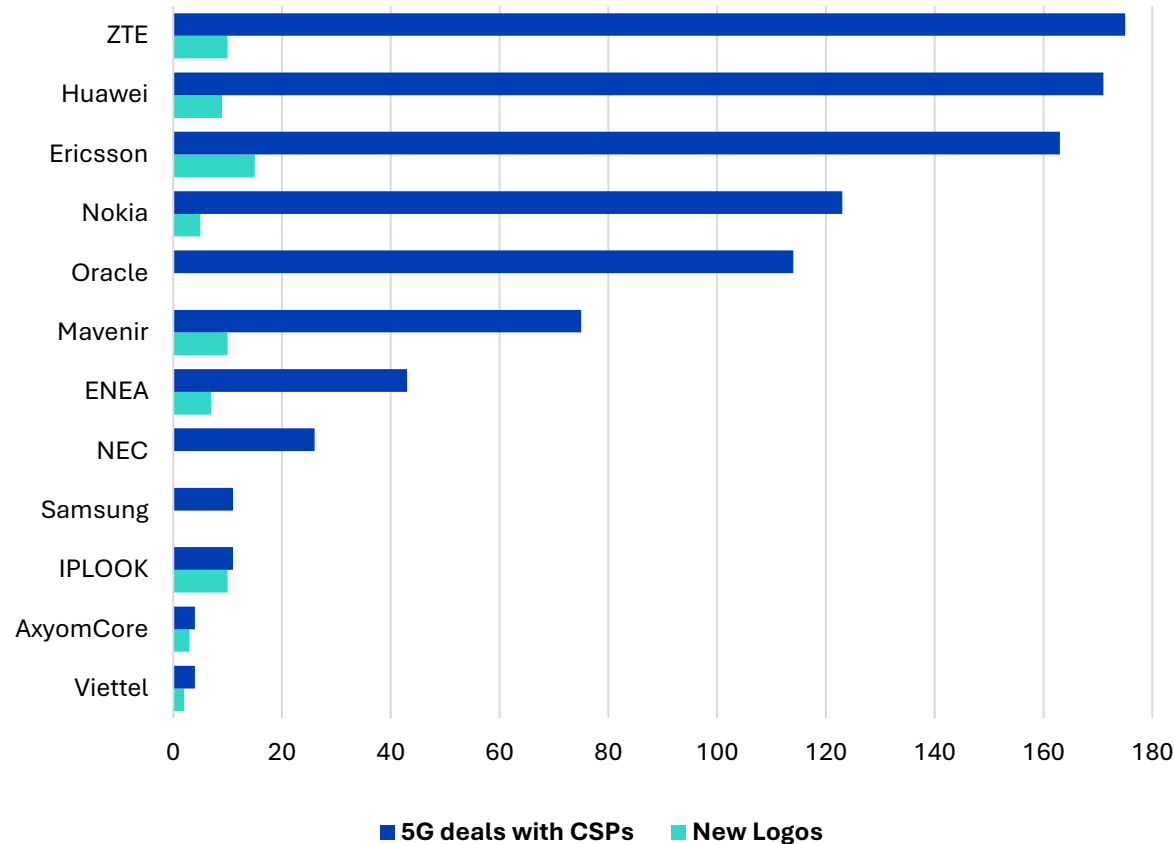


Source: Omdia

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5G deals with CSPs and new logos

Number of 5G commercial deals with CSPs and new logos, 2025



Source: Omdia

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- ZTE, Huawei, Ericsson, Nokia, and Oracle each had more than 100 5G deals in 2025. ZTE continues to expand its presence in Asia & Oceania, Europe, and Africa while Huawei has a strong presence in Asia & Oceania, the Middle East & Africa, and Latin America & the Caribbean. Ericsson, Nokia, and Oracle have a strong focus in Europe where the market is both diverse and fragmented. The high number of operators in the region means that a significant number of deal opportunities are available.
- The new logo metric indicates whether a vendor has gained 5G business at the expense of a competitor or with a greenfield 5G deployment. With nonstandalone (NSA) 5G, most operators use their existing 4G EPC vendor to upgrade the core. Given the tight relationship between 4G and 5G in NSA, a vendor winning a 5G contract where it did not already provide 4G is a strong endorsement of its solutions. This shows an operator is willing to either rip and -replace an incumbent 4G vendor by building a new, more advanced cloud-native platform that services both 4G and 5G or go through the challenges of interoperability between the two vendors.
- Four vendors—Ericsson, IPLOOK, Mavenir, and ZTE—each have 10 or more new logos. The CSPs' desire to build their 5G core with a multi-vendor architecture gives challengers, such as AxyomCore and Mavenir, the opportunity to win new logos, even if the deals do not encompass a full suite of 5G core NFs. Nonetheless, both Ericsson and Nokia are also winning deals to deliver one or more core NF groups.
- The 5G core is widely considered more strategic than its predecessors, given its role in enabling advanced NFs, monetization models, and national digital sovereignty goals. This elevated status has, in some cases, led to policy-driven advantages for non-Chinese vendors, particularly in countries such as those in the Five Eyes alliance (comprising Australia, Canada, New Zealand, the UK, and the US) and Europe, where security and geopolitical considerations influence procurement decisions. Meanwhile, Chinese vendors have maintained momentum, securing significant 5G core deals in emerging markets, sometimes at the expense of Western vendors.

Portfolio assessment

Core portfolio

- Omdia breaks down the core network portfolio into seven categories; core portfolio breadth targets both 4G and 5G NFs, but the remaining six all target the new 5G core. The six categories are cloud-native maturity, signaling, automation, core as a service, AI/ML and analytics, and other network functions.
- Omdia believes that cloud-native maturity is the most important category, so it carries the highest weighting. The cloud-native maturity category accounts for the work done by vendors to deliver 5G core container network functions (CNFs).
- Signaling NFs will enable vendors to support CSPs’ efforts to reduce 5G core deployment costs and resiliency, while automation will help reduce opex and manual activities during core NF lifecycle management.
- Software as a service (SaaS), traditionally applied to IT workloads, is now emerging as a new category within telecom infrastructure. Some vendors are advancing a vision for deploying 5G core NFs as a service, hosted within hyperscaler environments, managed directly by the vendor, and monetized via subscription or consumption-based models.
- As previously noted, these rankings are based on portfolio offerings and detailed vendor descriptions but not on actual performance in the field because Omdia lacks the means to test vendors’ software.
- For this report, we collected information from 12 core vendors, including one new vendor. Each was asked detailed questions about each category.
- Nokia maintained its top position, which constitutes industry leadership for the core portfolio, with a score of 90/100. It was followed by Huawei and Ericsson (88/100) and ZTE (85/100), which moved to third position in this year’s analysis.

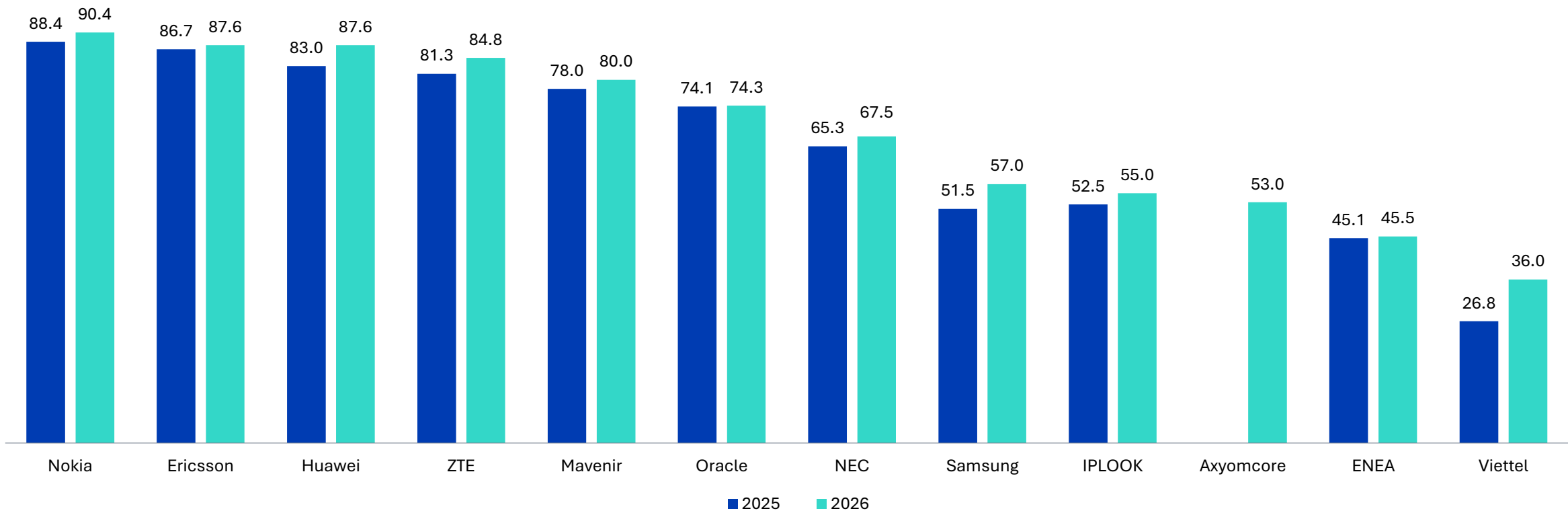
Summary of categories, score weight, and top three vendors per category				
Dimensions and categories	Score weight	#1	#2	#3
Core portfolio breadth	20	More than five vendors with maximum score		
Cloud-native maturity	25	Ericsson, Huawei, Nokia	Mavenir, ZTE	NEC
Signaling	15	Huawei, Nokia	Ericsson, ZTE	Mavenir, Oracle
Automation	15	Huawei, Nokia	Ericsson, ZTE	Mavenir, NEC
Core as a service	10	NEC, Nokia	Ericsson, ZTE	Mavenir
AI/ML and analytics	10	Huawei, Nokia	Ericsson, ZTE	Mavenir, Oracle
Other network functions	5	Ericsson, Nokia	Huawei, ZTE	Mavenir, NEC
Total core portfolio	100	Nokia 90/100	Ericsson, Huawei 88/100	ZTE 85/100

Source: Omdia

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Core portfolio scores, 2025 and 2026

Core portfolio scores (maximum 100 points)



Notes: Scores are relative. If a vendor has a lower score than in the previous edition, it does not mean that this vendor's portfolio is weaker in 2026 than 2025, but that the status of each vendor relative to the others has changed. Weighting has also slightly changed, and several categories are updated, which affects the total score.
Source: Omdia

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Core portfolio breadth

- The core portfolio category considers the availability of 3GPP-compliant 4G and 5G core NFs. Results from Omdia’s *Service Providers Core Networks Survey – 2025* indicated that 78% of CSPs will want to build a multi-vendor 5G core that includes two or more vendors. They will, therefore, need to be able to choose best-of-breed NF solutions from more than one vendor.
- Omdia divided the NFs into subcategories, which include packet core, subscriber data management, routing and selection, security and roaming, policy and charging, and automation, orchestration, and analytics, for which vendors were surveyed to better understand their strengths. A new set of questions on roaming was introduced in this year’s survey.
- The 4G EPC NFs and vendor strengths were part of the survey research; however, Omdia research indicates that as CSPs plan their core migrations, they are interested in vendors’ 5G core solution strengths. Furthermore, given the industry move to containerized solutions, most vendors (except for Ericsson and Nokia) stopped providing 4G core based on proprietary hardware in 2021 and instead focused their efforts on virtualized or cloud-native EPC solutions only.
- Some of the vendors surveyed for this report, including AxyomCore, ENEA, and Samsung, provide a limited set of NFs. Similarly, Oracle does not provide 4G or 5G packet core NFs and has focused its efforts on routing and selection, policy and charging, analytics, and automation subcategories. Therefore, we should be cautious when benchmarking these vendors’ solutions against those of the larger ones. More than five vendors in this category obtained the maximum score.

Cloud-native maturity

- It is important that vendors develop their NFs based on complete set of cloud-native design principles. The category has evolved from “cloud-native readiness” to “cloud-native maturity” given that vendors have largely completed the transition to cloud-native architectures. Vendor differentiation now lies in the depth, quality, optimization, and scale of their implementations rather than basic capability or preparedness. Several new questions, including power efficiency, were added in this year’s survey to better gauge vendors’ cloud-native maturity.
- CSPs may choose to deploy NFs on the vendor’s own cloud environment (known as a single-stack solution); however, a more complex multi-vendor scenario would be to deploy the NFs from different vendors on the third-party cloud for their private buildout. Some examples of private cloud environments are Red Hat Openstack (for NFs based on virtual machine [VM]), Red Hat OpenShift (for container-based NFs), SUSE, and VMware Tanzu. CSPs may also have built their own cloud environments, such as Sylva.
- CSPs may also choose to build their 5G core on a combination of clouds. An example includes building an instance of 5G core on a public cloud provider (PCP) such as Alibaba, AWS, or Google Cloud Platform (GCP).
- For the overall category, Ericsson, Huawei, and Nokia were the leaders, based on the details given, on adherence to cloud-native design principles, use of a centralized shared data layer, advanced user-plane offload performance, deployments on third party cloud platforms and power efficiency. Mavenir and ZTE were the runners-up, followed closely by NEC.

Signaling

- The 5G core is built as a service-based architecture (SBA) where the goal is to ensure consumer NFs can communicate efficiently and request services from producer NFs. Nonetheless, this will require the availability of a service-based interface (SBI) that acts as an abstraction, allowing NFs to discover other NFs connected to the same interface link. New questions on resiliency, such as capabilities to manage overload and signaling storm protection mechanisms, were added to the survey this year.
- Four models, A to D, were devised by 3GPP in order of decreasing new NF rollout complexity to help alleviate CSPs' NF integration work. Model A is for lab trials. B was used in early rollouts; however, it is not considered an efficient architecture in the long term. Release 16 introduced the service communication proxy (SCP) used in model C and D; however, deploying the target architecture of model D requires a performant SCP.
- Vendors reported that many CSPs are still using model B. These were the fast movers that deployed 5G core early, and many of them are considering deploying the SCP to migrate to model C or D. In a multi-vendor environment, unless the SCP can manage protocol adaptations to translate different vendors' messages, models C and D would not be feasible. Most vendors reported that their solutions support these.
- Huawei and Nokia obtained the top position in this category thanks to the number of live model D deployments and adaptive flow control to improve resiliency and protect against signal storms. Ericsson and ZTE were the runners-up, followed by Mavenir and Oracle.

Automation

- To enhance network agility, improve operational efficiency and scalability, reduce costs, and remain competitive in an increasingly cloud-driven environment, CSPs are accelerating the adoption of automation. As they seek to mirror the rapid service deployment capabilities of the PCPs, CSPs require robust automation frameworks to support end-to-end lifecycle management across many layers, enabling faster, more consistent delivery of new services.
- Several new questions were introduced in this year's survey to better assess vendors' automation strategies, covering areas such as the implementation of CNF-specific automation artifacts (e.g., Helm charts), the adoption of AI/ML, the execution of pre- and post-upgrade validation checks, and the maturity of closed-loop automation capabilities.
- In the cloud era, CSPs must manage an increasing volume of software releases across the infrastructure stack, spanning cloud platforms, hardware layers, network functions, and critical security patches. To address this, they require robust CI/CD pipelines and Git-based workflows to automate software delivery, streamline acceptance testing, and support in-service software upgrades (ISSU). This enables reduced maintenance windows, minimizes service disruption, and accelerates time-to-market for new services.
- Huawei and Nokia are ranked jointly in the top position in this category thanks to the strength of their automation solutions, including comprehensive capability coverage, extensive pre-upgrade validation checks, integrated and platform-centric architectures, and the delivery of closed-loop automation that is repeatable in live network environments. Ericsson and ZTE are positioned as strong runners-up, followed by Mavenir and NEC.

Core as a service

- Omdia defines core as a service as a core network solution provided on a scalable public cloud infrastructure, where the vendor is responsible for both the operation and the maintenance of the software and for ensuring that the cloud-based infrastructure can deliver the required network performance. The customer pays for the service on a subscription-based or consumption-based model.
- Many vendors incorporated elements of the above definition but often overlooked key aspects, such as the structure of the payment model or the requirement for the solution to be vendor managed. This latter point is particularly critical in this new approach to delivering core solutions, because it enables the end client to classify investments as opex rather than capex, eliminating upfront costs. As a result, organizations such as cable operators lacking mobile telecom expertise or enterprises seeking private network capabilities can leverage core-as-a-service offerings to deploy 5G core solutions and enter new markets more easily. Other use cases, such as 5G standalone roaming, are also emerging.
- Managing and operating 5G core networks is highly complex and demands specialized expertise. However, not all CSPs have the internal resources or capabilities to build and sustain such advanced teams or consistently meet performance KPIs—particularly smaller operators. Even among established Tier 1 CSPs that have been pursuing 5G transformation for several years, the process remains challenging and far from straightforward.
- NEC and Nokia are jointly ranked in the top position thanks to their understanding of the key concepts and commercial deployments. These vendors, together with Ericsson and ZTE as the runners-up, were followed closely by Mavenir.

Other network functions

- This category has evolved from *policy and charging* to *other network functions* because of the importance of gauging vendors' implementations of network function groups beyond policy and charging, such as subscriber data management (SDM) and network exposure function (NEF).
- Some of the questions added this year were about the vendors' simplification and consolidation strategies of packet core network functions and how the data layer is built for SDM, including resiliency and disaster recovery.
- Standalone 5G cores enable a broad set of services beyond traditional mobile broadband, where CSPs must expose network capabilities through standardized APIs. To achieve this effectively, vendors should participate in industry initiatives such as CAMARA and the GSMA Open Gateway, which aim to harmonize network APIs and abstract underlying complexity. These frameworks allow enterprises, aggregators, and developers to access capabilities through unified interfaces, supported by API publication, lifecycle management, and SLA-based governance. In addition, strong collaboration between vendors and a diverse set of CSPs is critical to expand the global reach and adoption of these standardized APIs, ensure interoperability, and enable scalable service innovation across markets.
- Ericsson and Nokia gained top scores for this category thanks to their network exposure strategies. Ericsson through its ecosystem-driven API model and Nokia through its network-as-code approach demonstrate focus on enabling operators' monetization strategies. This is a critical requirement for operators moving beyond connectivity into platform-based business models. Huawei and ZTE are the runner-up, followed by Mavenir and NEC.

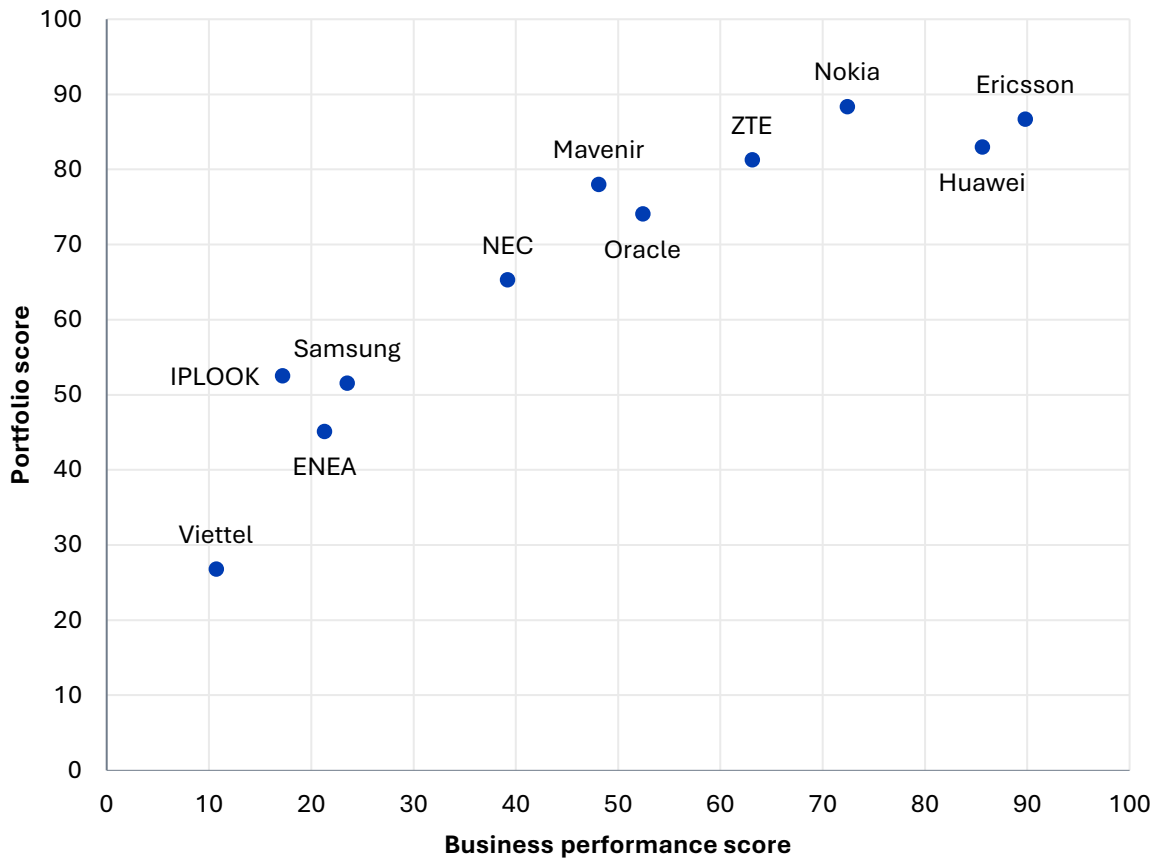
AI/ML and analytics

- The set of survey questions in this category was expanded to cover AI/ML, AI native, and analytics.
- To create monetization opportunities, the Network Data Analytics Function (NWDAF) together with AI tools can help CSPs to improve traffic classification and deliver better service quality of experience for premium paying customers through closed-loop service assurance.
- From a core network AI and analytics perspective, CSPs will look to production-grade NWDAF deployments, strong adherence to 3GPP architecture, and tight integration of AI within core network functions that enable scalable and multi-vendor-ready analytics adoption. The deep AI integration and closed-loop automation capabilities, where NWDAF-driven insights directly influence policy and session control functions, support more advanced, predictive, and intent-driven operations within the core.
- Some of the other efficiency creating and optimization use cases that vendors are leveraging AI to explore together with their CSP partners include AI operations (AIOps), root cause analysis to shorten mean time to resolution (MTTR), network and service assurance, and leveraging network large models to enhance control and user plane utilization.
- Huawei and Nokia obtained the top position in this category for the work done with CSPs in this space, while Ericsson and ZTE scored the same as runners-up, followed by Mavenir and Oracle.

Conclusion

Conclusion

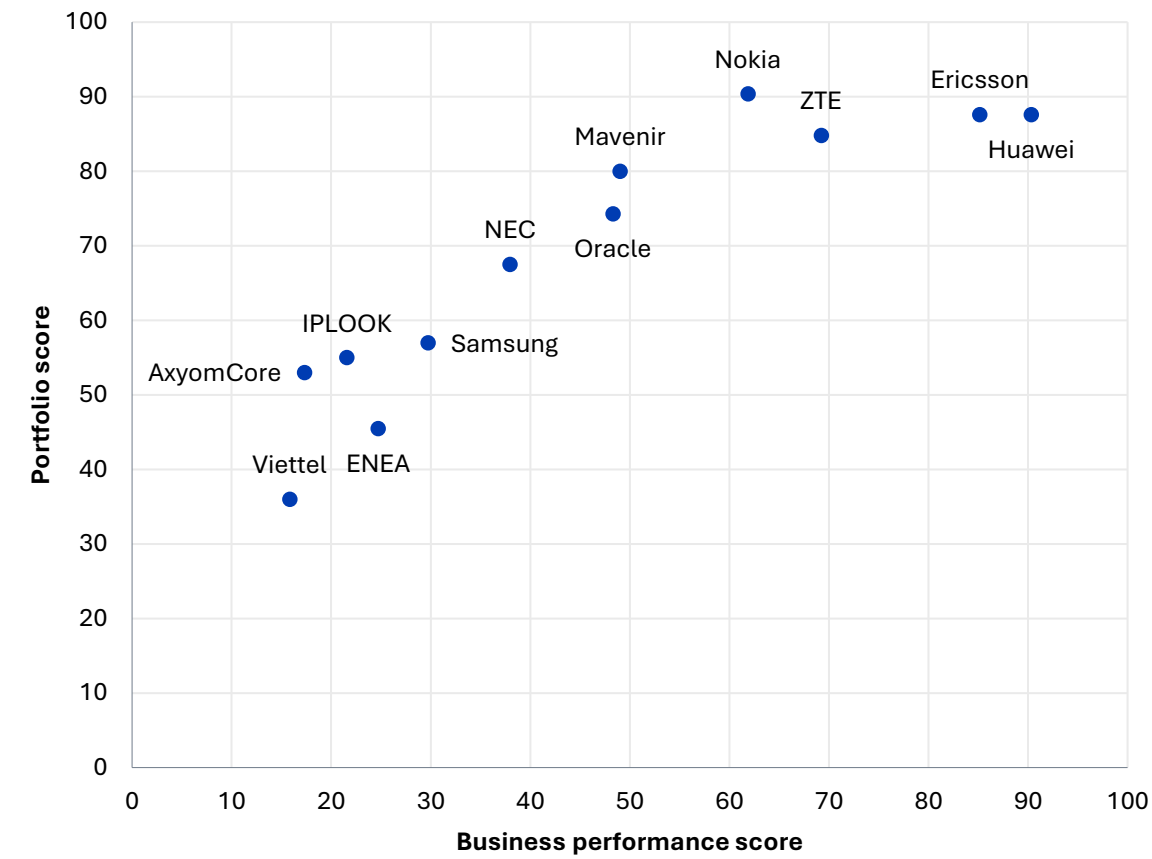
Overall core vendor positioning, 2025



Source: Omdia

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Overall core vendor positioning, 2026



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Appendix

5GC and 4G EPC NFs (1/2)

Network function	Description	4G equivalent
Access and mobility management function (AMF)	Supports the termination of nonaccess stratum (NAS) signaling, NAS ciphering, and integrity protection, registration management, connection management, mobility management, access authentication and authorization, and security context management.	Mobility management (MME)
Session management function (SMF)	Handles NAS for session management and interacts with the decoupled data plane by creating, updating, and removing protocol data unit (PDU) sessions and managing IP session context within the UPF.	Packet gateway for control plane (PGW-C)
User plane function (UPF)	Following on from the introduction of the control and user plane separation (CUPS), the UPF is an evolution of the 4G core PGW-U and will process and forward packet data so it can be distributed between the RAN and the wider data network.	Packet gateway for use plane (PGW-U)
Authentication server function (AUSF)	Used for device authentication and security processes between trusted 3GPP access and untrusted non-3GPP access. It stores authentication keys and provides AMF with the necessary authentication services.	New function
Network data analytics function (NWDAF)	Real-time monitoring and analytics of services, network-slice instances, and other core resources to provide insights as well as closed-loop automation.	New function
Charging function (CHF)	Supports online and offline charging features for multiple services, including 5G and 4G core integration.	New function
Policy control function (PCF)	This is an evolution from the 4G PCRF and supports a unified policy framework, such as providing policy rules to control-plane functions, and access to subscription information for policy decisions in UDR.	Policy and charging rules function (PCRF)

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5GC and 4G EPC NFs (2/2)

Network function	Description	4G equivalent
Unified data repository (UDR)	A repository of subscriber information used to service other 5G core network functions, such as the PCF and UDM.	New function
Network exposure function (NEF)	This function did not exist in the 4G core; it supports exposure of capabilities and events, secure provision of information from external applications to the 3GPP network, and translation of internal/external information.	New function
Network repository function (NRF)	Provides a record of all network functions available on the platform, together with a profile of each and the services they support.	New function
Service communications proxy (SCP)	Introduced in 3GPP Release 16, it is the central point that mediates high volume of control plane signaling and messages in real time, especially for the discovery requests sent to the NRF and other load balancing and traffic prioritization.	New function
Security edge protection proxy (SEPP)	A new security proxy between different operator networks, where all signaling traffic is expected to cross it. It provides authentication between SEPPs and enables filtering of incoming traffic from interconnect.	New function
Unified data management (UDM)	This provides a centralized way to process 5G user data. It also provides access authorization and registration.	Home subscriber services (HSS)
Application function (AF)	A similar function to the AF in 4G EPC. It retrieves resources through NEF and interacts with PCF for policy control.	New function
Network slice selection function (NSSF)	Designates network resources, such as the appropriate AMF, to different slices that deliver services to the end user devices.	New function

Source: Omdia

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Appendix

Methodology

This report draws on extensive research with network operators, network vendors, and Omdia’s tracker and data resources and forecasts.

Further reading

[*Core Market Tracker – 1Q26 Analysis*](#) (June 2026)

[*Core Market Tracker – 1Q26 Data*](#) (June 2026)

[*CSPs’ AI strategies for better monetization*](#) (March 2026)

[*MWC 2026 takeaways: Core networks*](#) (March 2026)

[*2026 Trends to Watch: Core Networks*](#) (October 2025)

[*Traffic Management Solutions: Essential for CSPs to Deliver Superior QoE on 5G SA Networks*](#) (September 2025)

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Appendix

Omdia consulting

We hope that this analysis will help you make informed and imaginative business decisions. If you have further requirements, Omdia's consulting team may be able to help you. For more information about Omdia's consulting capabilities, please contact us directly at consulting@omdia.com.

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