

ARTICLE 03

The Commercial Control Plane

From network capability to programmable revenue

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EXECUTIVE PROPOSITION

Network APIs will matter economically only when the industry builds a commercial control plane around them: common product definitions, discovery, consent, quality assurance, settlement and accountability across operators and channels.

Executive summary

Network APIs will matter economically only when the industry builds a commercial control plane around them: common product definitions, discovery, consent, quality assurance, settlement and accountability across operators and channels.

This evidence-led thought article develops an executive point of view using standards, official data, company disclosures and Moderion Advisory analysis. It separates established facts from emerging direction and reported implementation.

EXECUTIVE QUESTION

What institutional and commercial machinery is required to convert network APIs from technical exposure into repeatable, cross-market revenue?

Key insights at a glance

- In March 2026 GSMA reported 86 operator groups representing more than 300 networks and about 80% of global mobile connections aligned with Open Gateway, alongside more than 60 channel partners. These are GSMA-reported ecosystem participation measures, not audited API revenue.
- The API portfolio expanded from eight CAMARA APIs in 2023 to a broader set spanning identity, fraud, location, device, communications quality, payments and edge-related capability.
- Coverage is not revenue. GSMA's 2026 monetization analysis explicitly notes that enterprise awareness and API usage do not automatically translate into material operator income.
- The H1 2026 GSMA demand index reported strongest interest in banking and media, followed by healthcare, retail and aviation. Identity and anti-fraud remain near-term anchors while quality, location and device APIs broaden the proposition.
- Aggregators are a common route to market because enterprises need multi-operator reach. They also risk concentrating discovery, pricing and customer evidence outside the operator unless settlement and data rights are designed deliberately.
- The commercial control plane must include product catalogue, eligibility, discovery, consent, ordering, metering, charging, settlement, assurance, versioning, dispute resolution and deprecation - not only an API gateway.
- Public price discovery remains incomplete. As an adjacent retail benchmark, Twilio listed selected phone-intelligence requests from US\$0.008 to US\$0.10 in September 2026, while SIM Swap remained

contact-sales and country-dependent. These figures are CPaaS retail prices, not disclosed operator wholesale rates or revenue shares.

- CAMARA standardizes customer-facing service APIs; it does not operate a universal GSMA transaction hub. Commercial routes may be direct, federated, aggregator-led or marketplace-led, while TM Forum and operator systems support catalogue, ordering, fulfillment and assurance.
- The 5G Charging Function records network consumption inside the operator domain. It should not be confused with the external API product ledger, which must reconcile entitlement, consent, API result, charge, tax, channel share, service credit and operator net revenue.
- This article contributes to the Total Connectivity Economy by testing its enabling mechanism against universal reach, open interoperability, governed intelligence, trusted participation and sustainable economics.
- GSMA Intelligence's H1 2026 state-of-market work reports movement beyond identity and fraud toward quality, location and device APIs, while still identifying commercialization, aggregation and developer adoption as unresolved execution constraints.

Exhibit 1 | Open Gateway scale and commercialization signals

Indicator	2026 signal	What it proves	What it does not prove
Operator groups	86	Strategic participation	Active commercial coverage in every market
Networks	>300	Potential footprint	Uniform product and SLA
Mobile connections	c.80% global coverage	Addressable reach	Paid demand or revenue share
Channel partners	>60	Distribution interest	Operator control of pricing and evidence

Note: GSMA-reported status, March 2026. Participation and technical availability require market-level validation.

Exhibit 2 | Public pricing signals and the missing wholesale bridge

Public product signal	Published retail reference	Commercial limitation	Operator evidence still required
Line-type intelligence	US\$0.008/request	CPaaS retail, not Open Gateway wholesale	Net revenue, cost and paid recurrence
Identity match	US\$0.10/request; country variation	Coverage and price differ by market	Settlement and liability allocation
Reassigned-number risk	US\$0.020 to US\$0.0015 by volume	Different data product and use case	Comparable value per prevented event
SIM Swap	Contact sales	Carrier approval; coverage not universal	Price, response yield and operator share

Note: Twilio public US pricing viewed 5 September 2026. These are adjacent CPaaS retail reference points and must not be represented as CAMARA/Open Gateway market prices.

Exhibit 3 | API commercialization sequence and evidence chain

Stage	Primary actor	Authoritative record	Control failure to prevent
1. Discover	Enterprise / channel	Coverage and product catalogue	Selling an unavailable capability
2. Authorize	API provider	Identity, purpose, scope and consent	Unlawful or over-broad access
3. Execute	Exposure layer / network	Correlation ID and policy decision	Untraceable technical response
4. Assure	Operator and channel	Latency, result code and SLA evidence	Disputed performance
5. Charge	Product ledger / CHF inputs	Rated billable event	Successful but unbilled use
6. Settle	Operator and channel	Tax, share, credit and net revenue	Unreconciled economics

Note: CAMARA defines service-facing APIs; commercial fulfillment and settlement remain distributed responsibilities.

Core analysis

Exposure is not monetization

The network exposure function, CAMARA APIs and GSMA Open Gateway create an increasingly coherent technical route from network capability to application. The available catalogue now spans authentication and fraud prevention, location, device information, communication quality, payments and edge discovery. This is meaningful progress. Yet an API specification and an announced operator footprint do not establish repeat demand, attractive pricing or a durable operator share of value.

Developers buy simplicity. If the same use case requires different onboarding, consent, identifiers, error handling, service levels or commercial terms by market, the technical interface is not commercially common. The industry must therefore solve the operating model around the API, not only the API itself.

What the commercial control plane contains

The commercial control plane begins with a governed catalogue: a precise product definition, eligible users, data fields, purpose limitations, latency and accuracy commitments, geographic availability and version policy. It requires federated discovery so a buyer can determine which operator, device and market can support the requested capability. Identity and consent must be designed into the transaction, particularly where location or subscriber data is processed.

It also requires ordering, usage measurement, charging, settlement, dispute handling and service assurance. The 2026 GSMA technical realization guidance is important because it connects CAMARA exposure with TM Forum operate APIs for catalogue, onboarding, ordering, consumption and usage reporting. This is the point at which network programmability becomes a cross-company commercial system rather than a set of demonstrations.

Where demand is most credible

The nearest-term demand is likely to concentrate where the network provides evidence that another data source cannot easily replicate. Number verification, SIM-swap signals, device status and verified location can reduce fraud and authentication friction. Quality on demand may support time-bounded enterprise, media or industrial requirements where performance has measurable value. Edge discovery can help applications place workloads according to network proximity rather than geographical assumption.

The commercial test is not whether a use case is technically interesting. It is whether the buyer has a budget, the API changes an outcome, usage recurs, liability is manageable and the product can be delivered consistently across a useful footprint. Aggregate API call counts should be separated by paid versus trial traffic, unique applications, repeat usage, conversion, price and operator revenue share.

The strategic control question

Operators face a distribution choice. Direct exposure preserves customer insight and potentially more economics but requires developer experience, support and cross-operator reach. Aggregators simplify demand and international coverage but may control discovery, pricing and data. A balanced model can support multiple channels while preserving common product governance, transparent settlement and operator access to performance evidence.

The most defensible control point is not the API gateway alone. It is the combination of real-time network authority, trusted subscriber context, consent, assurance and contractual accountability. That combination must remain observable to the operator even when distribution is delegated.

Moderion Advisory perspective

From technical commonality to commercial commonality

A technically standardized endpoint can still deliver a fragmented product. Differences in onboarding, legal terms, subscriber identifiers, geographic availability, consent evidence, error codes, billing units and support processes impose integration cost on the buyer. Commercial commonality requires a governed product definition that travels with the API across markets.

The 2026 GSMA technical-realisation direction is strategically important because it links CAMARA network exposure to operating APIs for catalogue, onboarding, ordering, consumption and reporting. The remaining executive challenge is to allocate commercial authority and liability across operators, aggregators and developers.

A measurement system that resists vanity metrics

API counts, announced coverage and sandbox registrations are useful readiness indicators. They should not be reported as commercial success. Management needs a funnel from discovered developers to approved applications, trial calls, paid calls, recurring production workloads, gross revenue, operator net revenue, gross margin and retained cohorts.

Each product should also report the business outcome it enables: fraud prevented, authentication completion, conversion gained, downtime avoided or application performance protected. This makes price defensible and prevents the API business from becoming another volume story without economic proof.

Quantifying API unit economics without invented precision

A credible unit model begins with the enterprise price per successful outcome, not the nominal price per call. It then deducts aggregator or channel share, operator settlement, fraud and non-billable responses, platform cost, consent and compliance operations, support and service credits. A low-price signal used at every login can be more valuable than an expensive call used only for exceptional transactions; frequency, outcome value and false-positive cost shape willingness to pay.

Public CPaaS pricing offers boundary evidence but not a market-clearing Open Gateway tariff. Twilio's published Lookup schedule in September 2026 ranged from US\$0.008 for line-type intelligence to US\$0.10 for identity match, with volume tiers lower for selected products. SIM Swap pricing was not public and required carrier approval. The article therefore uses a transparent unit-economic equation and scenario ranges rather than claiming an industry average that the public evidence cannot support.

The end-to-end API transaction

A production transaction begins when an enterprise application requests a defined outcome through a direct operator endpoint or a channel partner. Discovery resolves whether the device, operator, geography and product version are eligible. Authorization then binds the application, purpose, end user or subscriber, requested scope and consent evidence. The exposure layer translates the northbound request into operator capabilities, executes it, and returns a result with a correlation identifier and assurance record.

Commercial completion occurs after the technical response. The channel ledger records the billable event; the operator product ledger reconciles eligibility, response code, latency, policy decision and agreed price; settlement allocates tax, refunds, service credits and partner shares. Network charging records from the 3GPP CHF may inform the cost or usage evidence, but the external API product is not automatically the same charging object. This separation prevents a successful API response from becoming unbilled or unreconciled consumption.

Rate cards, SLAs and contribution economics

Three commercial forms deserve controlled trials. Per-call pricing fits discrete evidence products such as number verification. Tiered subscriptions fit predictable recurring volumes with overage bands. Outcome-linked pricing can fit fraud reduction or service assurance when causality and liability are contractible. Public CPaaS prices are useful demand anchors, not evidence of operator wholesale rates or channel shares.

Contribution per successful paid outcome equals collected customer price minus channel share, operator network cost, fraud and non-billable leakage, consent and compliance cost, support, service credits and allocated platform cost. The board model should show response yield, paid-call ratio, repeat production cohorts, operator net revenue and gross margin by product, channel and country. Confidential revenue-sharing terms should be represented through sensitivities, not guessed point estimates.

Consent is part of fulfillment, not a legal appendix

CAMARA's Identity and Consent Management work separates consent status and capture from individual application logic. A privacy-sensitive request should carry purpose, scope and user context; the provider checks authoritative consent, returns a provider-managed capture route where required, and retains an auditable lifecycle record. Number Verification additionally uses short-lived, single-use access tokens and network or SIM-based authentication conditions.

The control design must distinguish subscriber, end user, enterprise customer and application developer. They can be different parties with different rights. Revocation, expiry, roaming, device change, SIM change and purpose expansion must therefore be modeled as runtime states that can stop fulfillment, not as once-only onboarding checks.

Programmability must preserve an open innovation edge

The Internet lesson is not that every network control should be permissionless. It is that common protocols and reusable interfaces allow innovation above the infrastructure without renegotiating the entire system. The commercial control plane should therefore expose bounded capabilities through interoperable, discoverable and auditable interfaces while retaining authentication, authorization, consent, assurance and settlement.

The evidence boundary for network-API monetization

The standards and deployment footprint are now observable; industry-wide economic materiality is not. Public evidence remains stronger on participating networks, API availability, partners and use cases than on recurring gross revenue, operator net revenue, churn effects or return on exposure-platform capital.

A credible commercial control plane must therefore publish a revenue bridge from API call to customer outcome, channel share, service credit and operator cash contribution. Until comparable disclosure exists, market-size forecasts should remain scenarios rather than reported results.

Exhibit 2 | Commercial control-plane accountability

Function	Minimum control	Primary evidence
Catalogue	Common product definition and version	Availability and conformance register
Trust	Identity, consent and purpose limitation	Auditable authorization record
Transaction	Order, usage, charge and settlement	Reconciled ledger
Assurance	SLA, incident and remedy	End-to-end telemetry
Economics	Price, share and cost-to-serve	Cohort P&L

Note: Moderion Advisory operating model.

Executive action agenda

- Select a small portfolio of APIs tied to measurable buyer outcomes rather than maximizing catalogue size.
- Create common product, consent, assurance and settlement rules across operating companies.
- Report paid calls, successful responses, active applications, repeat cohorts, retail price, channel share, operator net revenue, gross margin and value per prevented or enabled outcome.
- Design direct and aggregator channels with transparent data access and revenue-sharing terms.
- Establish liability, privacy and service-level ownership before scaling sensitive identity or location products.

Conclusion

The commercial control plane is the bridge between network engineering and software economics. If the industry treats programmability as a catalogue launch, value will again migrate toward the parties that simplify demand. If it builds a governed, measurable and interoperable commercial system, network capability can become a product class in its own right. In the wider series, this capability is treated as an enabler of the Total Connectivity Economy rather than as an end state in itself.

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