

Aria Recur — Scaling Complex Billing with AI and for AI

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IDC'S QUICK TAKE

Aria Recur 2025 showcased how AI-driven automation, real-time anomaly detection, and multi-agent billing workflows are transforming billing from batch invoicing into an autonomous monetization engine for complex AI billing workloads. By focusing on its expertise in billing, and utilizing its modular core through robust APIs and strategic alliances, Aria is positioning its multitenant SaaS platform as the cornerstone of the end-to-end revenue life cycle, seamlessly orchestrating quoting, metering, invoicing, renewals, and analytics.

EVENT HIGHLIGHTS

Aria hosted its annual Recur event for its leading clients and select analysts with the theme “AI in Billing at Work” on May 21 and 22, 2025, in Lisbon. The event showcased Aria’s business momentum, alongside the company’s latest product and partner innovations. Key sessions showcased:

- Future of Billing in an AI-Connected World
- [Aria Billie](#) and Aria Billie Connect product updates
- Aria Billing Studio + ServiceNow CRM partnership
- Aria + Salesforce partnership
- Aria’s product road map
- Analyst executive meetings and interactions

The event kicked off with CEO Tom Dibble’s opening keynote, “The Future of Billing in an AI-Connected World,” that not only set the stage for attendees to reimagine billing as fully AI-powered but also served as the launchpad for Aria’s next-generation platform, Aria Allegro, scheduled to enter beta in the third quarter and production by the end of the year.

During the event, there were presentations from partners on acceleration of digital monetization and thought leadership panels with industry executives on the changes that AI is making on the billing aspect of different industries such as media, telecommunications, and consulting. The event offered an intimate opportunity to engage with Aria executives, partners, and customers on the Future of Billing and Aria’s latest innovations. They also offered analysts an executive briefing to discuss Aria’s growth metrics, strategic direction from the board of directors, and competitive positioning.

Coming out of Recur, Aria had two key messages to present. Aria sees the monetization pendulum in many industries swinging from all you can eat to monetization models with greater emphasis on usage-based pricing. Second, a catalyst and symptom of this swing is the need to develop pricing mechanisms (and billing systems) that support the monetization of AI features and products with complex usage attributes. The challenge is as always to make billing for complex services look simple to customers.

IDC'S POINT OF VIEW

Aria demonstrated an impressive set of fundamentals, showcasing strong revenue and profitability growth driven by expanding customer business within existing accounts. The company's deep partnerships with Salesforce and ServiceNow serve as powerful catalysts for acquiring new logos. Aria's executives clearly articulated their vision of the customer and positioning in the market as a leading complex billing provider for large enterprises in B2B and B2C. Notably, Aria is not pursuing growth at any cost; instead, it maintains a clear focus on the unique characteristics of the customer base it targets.

One of Aria's most significant customer segments is telecommunications. This vertical has contributed substantially to Aria's revenue and logo growth, as evidenced by the customer case studies it shared, the logos present in the room, and the prospects it discussed. The telecom sector is undergoing a generational shift, grappling with its identity and aspirations. Many telco executives are dissatisfied with the industry's perception as a utility and are striving to transform their organizations from "telco" to "techco." This transformation involves directing investments toward initiatives that foster innovation and enable the scaling of new B2B/B2C services. In this context, industry leaders such as AT&T, Vodafone, Deutsche Telekom, and KDDI are championing initiatives like CAMARA, a Linux Foundation-hosted organization aimed at standardizing telco APIs to empower developer ecosystems and unlock new monetization opportunities. Concurrently, the AI furor of the past three years has driven telcos to forge new ecosystem partnerships and revamp or launch services that integrate AI capabilities for their existing customer bases. Examples include Verizon's AI Connect suite and Orange Business' sovereign GenAI offering.

Aria fits well in this evolving landscape. As a billing specialist, the company focuses on handling the complex billing requirements associated with diverse infrastructure and AI monetization models. Aria Billie, an integrated agentic copilot product for customers using Aria's customer portal, exemplifies this focus. Aria Billie Connect, currently being productized and expected to be made general available in the second half of 2025, serves as the technical foundation for Aria Billie and enables Aria to act as the billing "agent" within multi-partner agentic workflows. Through Aria's partnerships with Salesforce and ServiceNow, it is already demonstrating its ability to operate effectively in multi-agent environments.

From a monetization and revenue life-cycle perspective, Aria's executive team reinforced that billing is their foundation, focus, and expertise; it is the lane they will stay in. Throughout the event, leaders emphasized how Aria's modular architecture, paired with a large ecosystem of integrations and partnerships, enables customers to orchestrate quoting, usage metering, billing, collections, renewals, and analytics as one continuous, AI-powered monetization engine. By opening its ecosystem via robust APIs and strategic alliances, Aria is empowering partners to build adjacent capabilities on top of its core billing platform, delivering a seamless, end-to-end revenue life cycle experience for the enterprise. The message was clear: Aria believes billing cannot be a back-office afterthought but must sit at the nucleus of the entire revenue life cycle.

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