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Monetisation platforms: worldwide market shares 2022

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Extract

The wider roll-out plans for 5G SA remains an important driver of new spending as CSPs invest in upgrading their billing and charging systems

5G-readiness is a key requirement for almost all new investments in monetisation systems, even when the CSP in question does not have any plans to deploy 5G in the near future.

5G is the single most significant driver for new projects in the monetisation platforms market. The combination of the new 3GPP standards for 5G, which are encouraging an extensive overhaul of charging architecture, and the commercial need to create new service revenue, has triggered new spend. CSPs are specifically looking to use 5G SA functionality to create new business services to generate new revenue. These services need rapid set-up, dynamic pricing and automations to expose network-as-a-service (NaaS) functions to partners.

3GPP standards are changing the underlying charging, rating and policy management architecture. For example, the need for mediation systems is removed because mediation is provided via standardised APIs.

5G also provides a driver for more complex services, particularly those that are sold B2B or B2B2C. The ability for 5G to provide services on wireless with high reliability enables new services offerings to be created, which in turn require complex partnerships and better management of associated ecosystems.

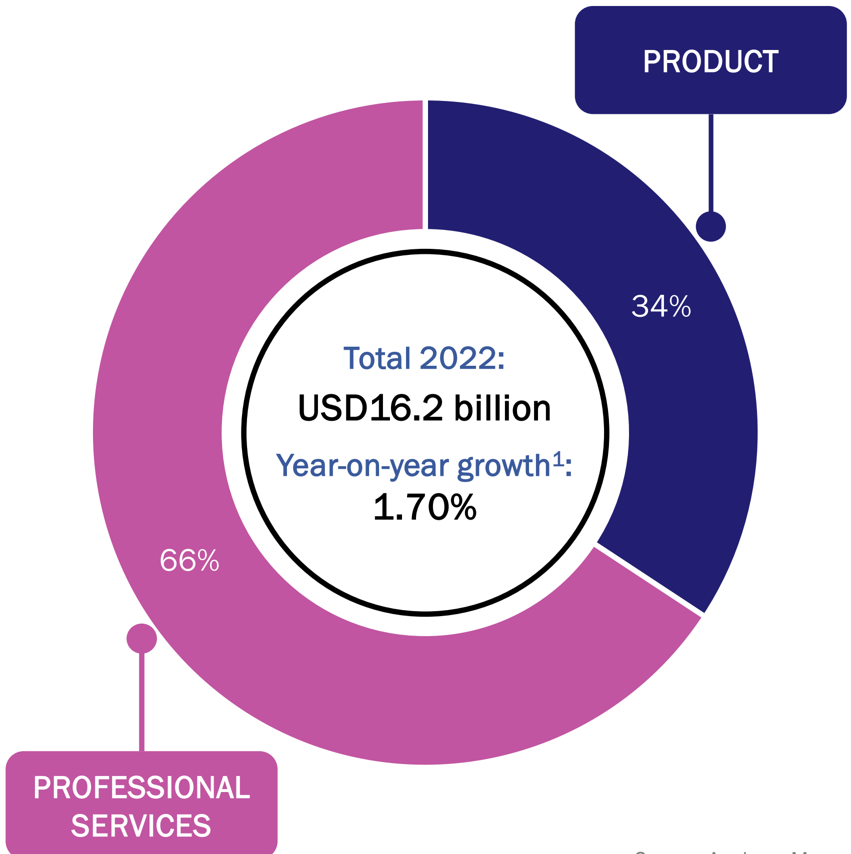
Figure 2: New functionality enabled by 3GPP standards, by network type

Monetisation platform functionality	4G	5G NSA	5G SA
Enable digital experiences, application subscriptions and service usage on-demand	+	+	+
Support hybrid prepaid/postpaid rating and billing	-	+	+
Support dynamic pricing based on customer behavior data analysis	-	+	+
Converge online and offline charging	-	-	+
Distribute and scale complex mediation functions independently as needed	-	-	+
Expose and charge for any network or service capability in real time	-	-	+
Rate any combination of granular service characteristics in real time	-	-	+

Source: Analysys Mason

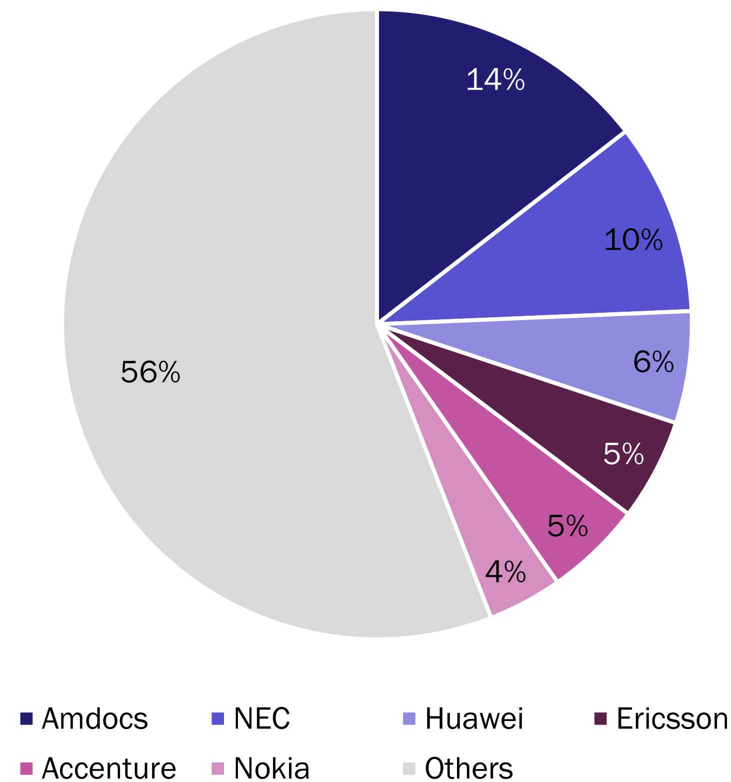
Monetisation platforms revenue market share

Figure 4: Monetisation platforms total revenue by type, worldwide, 2022



Source: Analysys Mason

Figure 5: Monetisation platforms total revenue by vendor, worldwide, 2022[2]



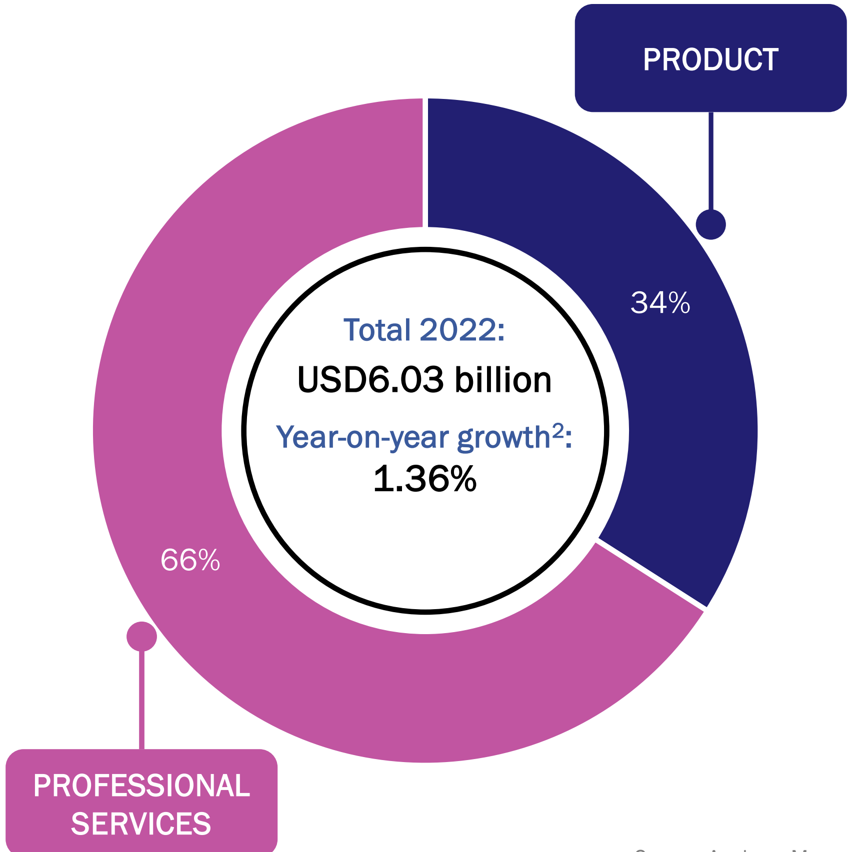
Source: Analysys Mason

[1] Note that 'revenue assurance' revenue is not included in year-on-year growth.

[2] Other vendors include CSG International, Infosys, Matrix, Oracle, Tech Mahindra, Optiva and Zira.

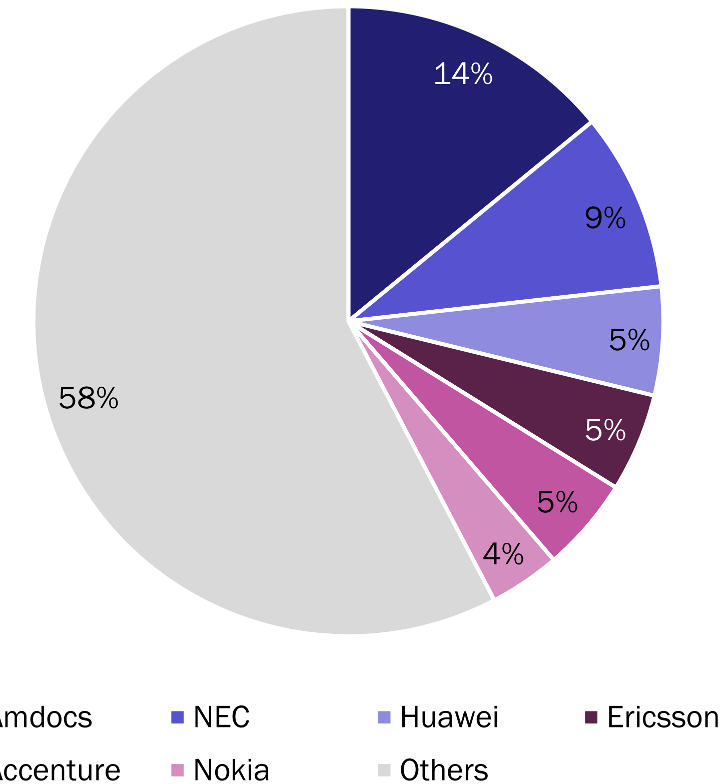
Billing and offer creation revenue market share

Figure 8: Billing and offer creation revenue by type, worldwide, 2022



Source: Analysys Mason

Figure 9: Billing and offer creation revenue by vendor, worldwide, 2022



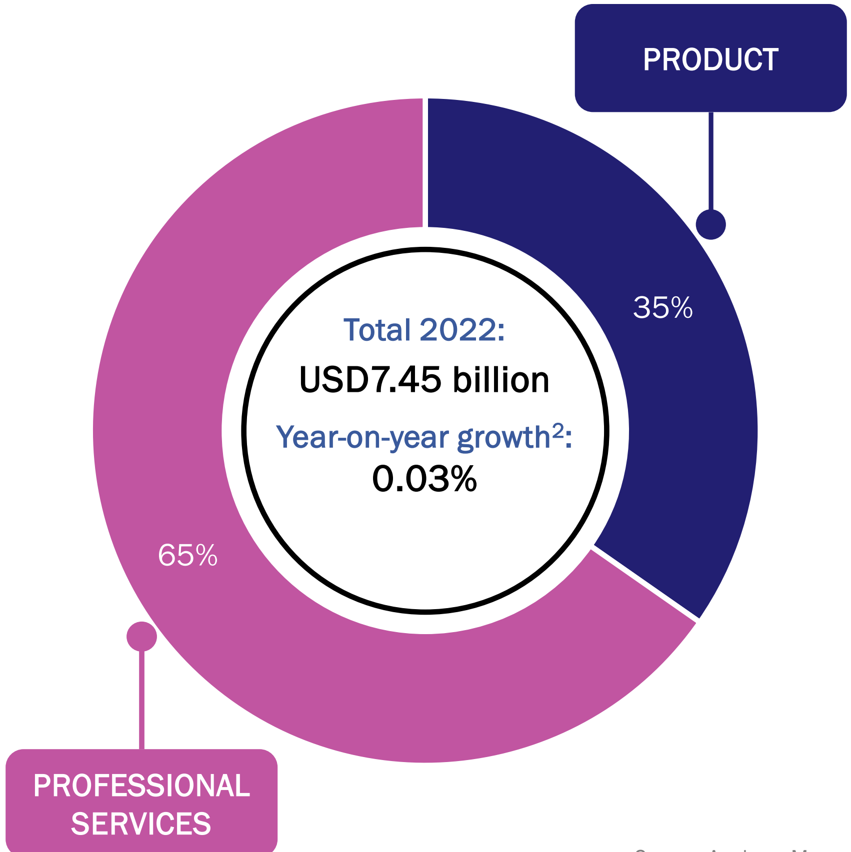
Source: Analysys Mason

[1] Other vendors include CSG International, Infosys, Oracle, Tech Mahindra, Totogi, ZTE and Zira.

[2] Based on estimates for the sub-segment in 2021.

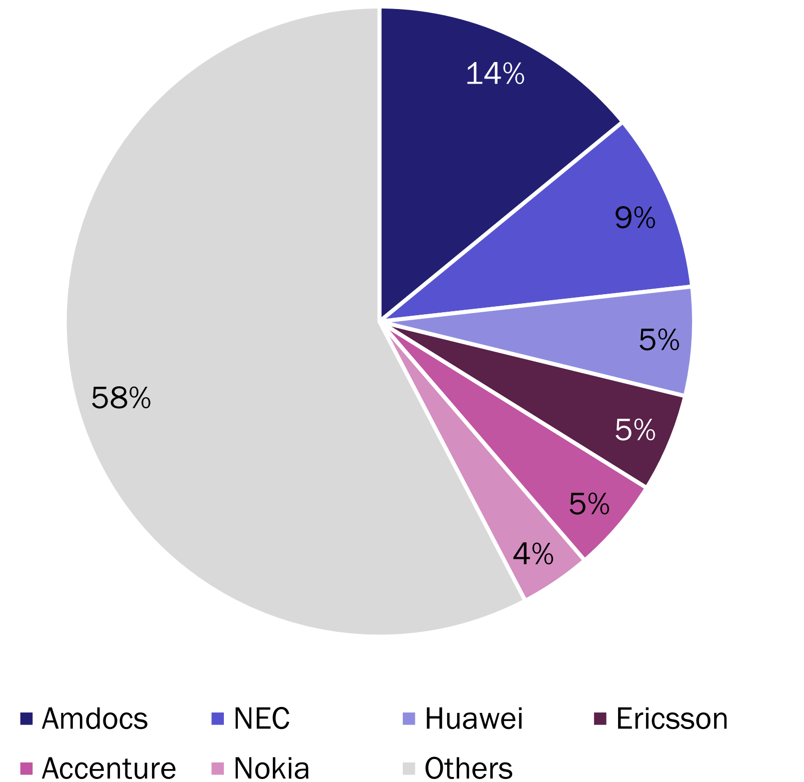
Charging, rating and policy management revenue market share

Figure 10: Charging, rating and policy management revenue by type, worldwide, 2022



Source: Analysys Mason

Figure 11: Charging, rating and policy management revenue by vendor, worldwide, 2022



Source: Analysys Mason

[1] Other vendors include AsiaInfo, CSG, Infosys, MATRIXX Software, Tech Mahindra and ZTE.

[2] Based on estimates for the sub-segment in 2021.

Amdocs: strategy overview

Amdocs is a leading provider of software products and services in the telecoms, media and entertainment industries.

Amdocs has positioned itself as an established player for BSS/OSS, network and media function offerings. It develops, implements and manages proprietary and third-party software and professional services to support the entire customer lifecycle.

Amdocs's offerings are designed to help customers to meet the operational challenges related to rolling out 5G. Amdocs's 5G value plane cloud-native solution includes a 5G-native monetisation suite, along with policy and charging control integrated with Amdocs's Catalog, NWDAF, NEF and end-to-end orchestration functions.

Amdocs recently launched the Amdocs Freestyle Billing solution in 2022 to offer CSPs an agile approach for monetising 5G. This allows CSPs to minimise complexities for customers and to optimise their billing systems across different services in order to deliver a smooth monetisation experience and to support partner management across B2B2X ecosystems.

Amdocs's Digital Brands Suite is a digital, cloud-native SaaS BSS with pre-built customer journeys for care, commerce, ordering, billing and charging for digital brands, low-tier CSPs and MVNOs. It provides TMF-compliant open APIs and supports single or multi-play for all lines of business (B2C, B2B, wholesale, MVNx, convergent and non-telecoms) and services (5G mobile, fixed, broadband, TV and OTT).

Figure 18: Key data

Company details	▪ Founded in Israel in 1982 ▪ Headquartered in Chesterfield, Missouri, USA ▪ 29 000 employees in 30 countries ▪ Operations in over 85 countries
Revenue	▪ Total revenue in 2022: USD4.66 billion (+8.1% year-on-year) ▪ Total revenue by region: 68% from North America, 13% from Europe and 19% rest of the world ▪ Total revenue by vertical: 60% managed services and 41% other
Key customers	Over 350 communications and media providers including AT&T, Altice, Comcast, Dish, Globe, Lumen, Rogers, Singtel, T-Mobile, Telefónica, TELUS, Verizon and Vodafone
Partnerships	AWS, Camunda, Commbox, Creatio, Google Cloud, KMS Lighthouse, Lightico, MCE and Microsoft
Professional services, products and solutions	Amdocs Catalog, Amdocs Charging, Amdocs Freestyle Billing, Amdocs Bill Experience, Partner Management, Amdocs Policy, Amdocs Real-Time Billing, Amdocs Subscription Billing, Amdocs Digital Identity Management, Content Cloud Amdocs CES23 Suite Amdocs Digital Brands Suite (BDS SaaS) Amdocs Subscription Marketplace (was MarketONE)

Source: Analysys Mason