Monetisation platforms: worldwide market shares 2023

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Extract

Recommendations

1

Vendors must ensure that their propositions enable capex/opex reduction so that CSPs can justify their purchases.

Cost reductions are driven by increased levels of automation, potentially achieved using AI. Vendors should offer integrated solutions that address end-to-end business-based processes. They should provide worked examples and cases studies with clear details of the cost reductions achieved.

2

Vendors should provide all-in-one solutions that support integration with traditional applications and have common development studios.

Vendors should develop deeply integrated solutions that have common data sources, user interfaces and integrated development environments, as well as the ability to create powerful automations across what were once separate application areas. These integrated platforms have numerous benefits such as simplicity, reliability, reduced time-to-market for new services and reduced maintenance effort.

3

Vendors must efficiently support the creation and delivery of new services.

CSPs need to be able to efficiently create, introduce and support new services. Such services will increasingly require new partnerships to be formed, beyond those needed for traditional telecoms services. Vendors should play a strong role in sourcing and creating new service offerings that multiple CSPs can use and should provide systems that are able to manage potentially complex partnerships.

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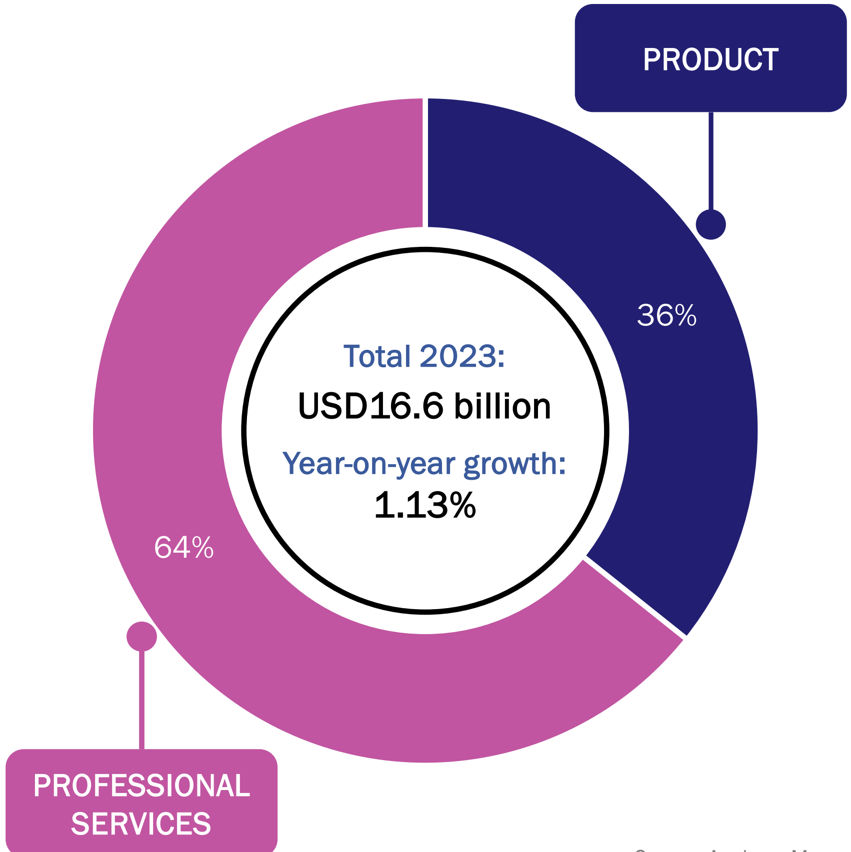
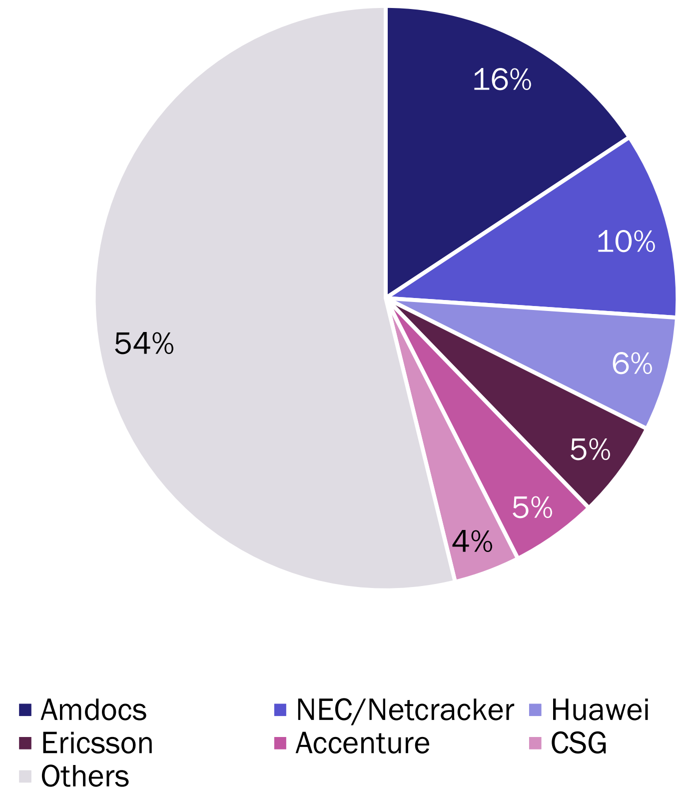
Figure 4: Monetisation platforms total revenue by type, worldwide, 2023



Source: Analysys Mason

Figure 5: Monetisation platforms total revenue by vendor, worldwide, 2023[1]

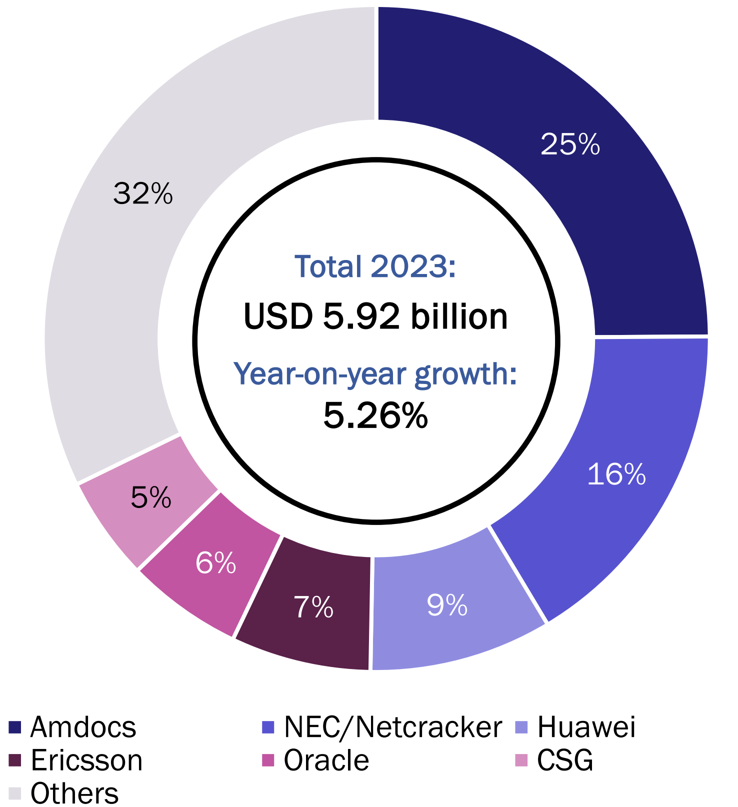


Source: Analysys Mason

[1] Other vendors include Cerillion, Matrix, Nokia, Optiva, Oracle, Tecnotree, Zira and ZTE.

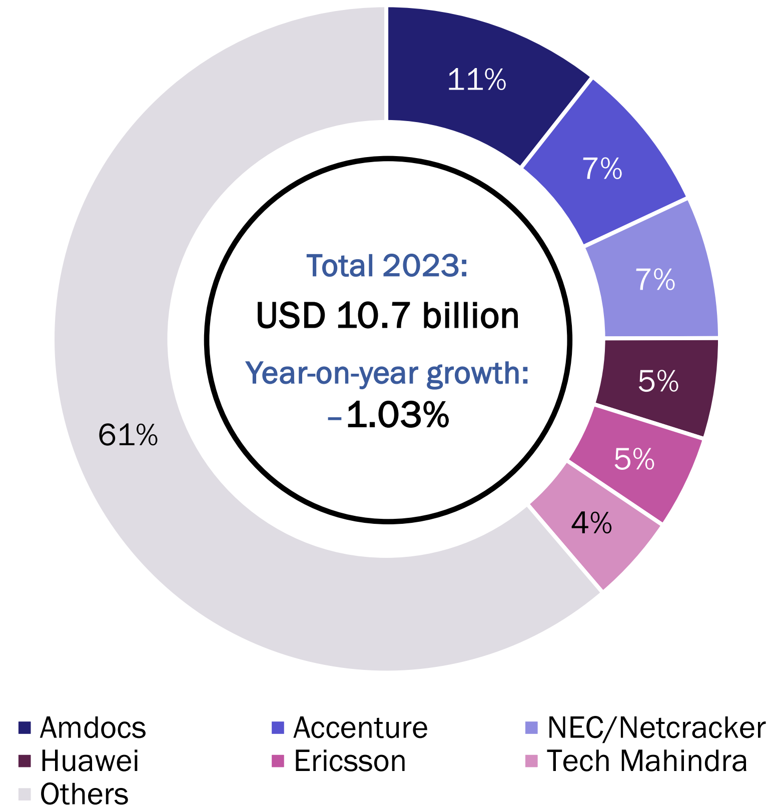
Monetisation platforms revenue market share

Figure 6: Monetisation platforms product revenue by vendor, worldwide, 2023[1]



Source: Analysys Mason

Figure 7: Monetisation platforms professional services revenue by vendor, worldwide, 2023[1]

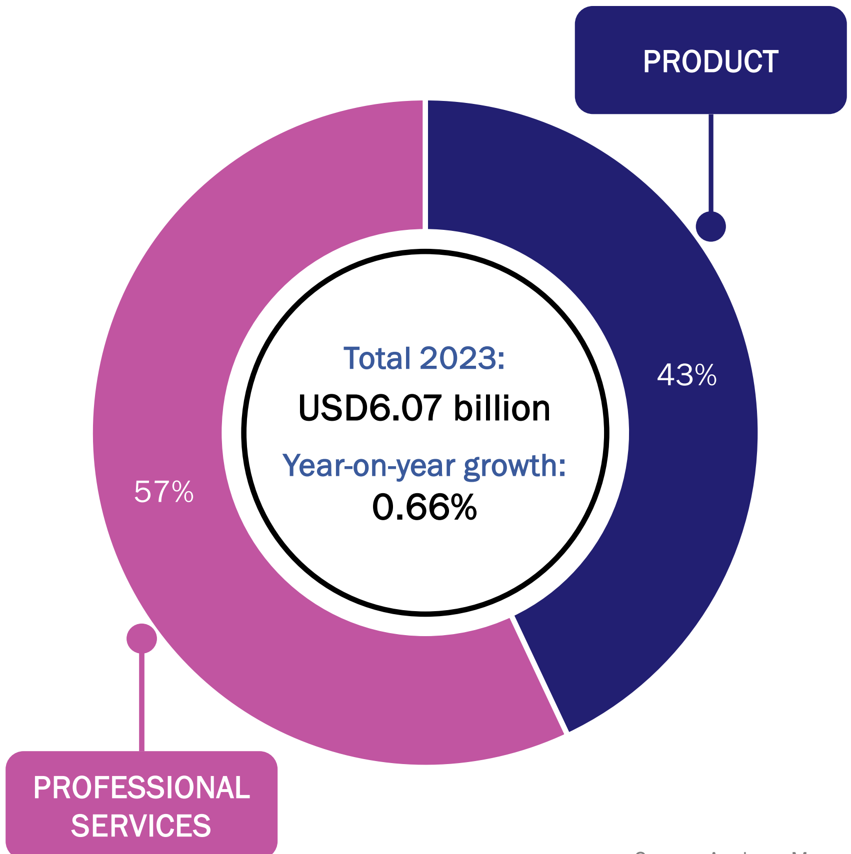


Source: Analysys Mason

[1] Other vendors include Atos, CapGemini, Cerillion, Comarch, Comviva, Matrixx, Nokia, Optiva, Tecnotree, Teito, Wipro, Zira and ZTE.

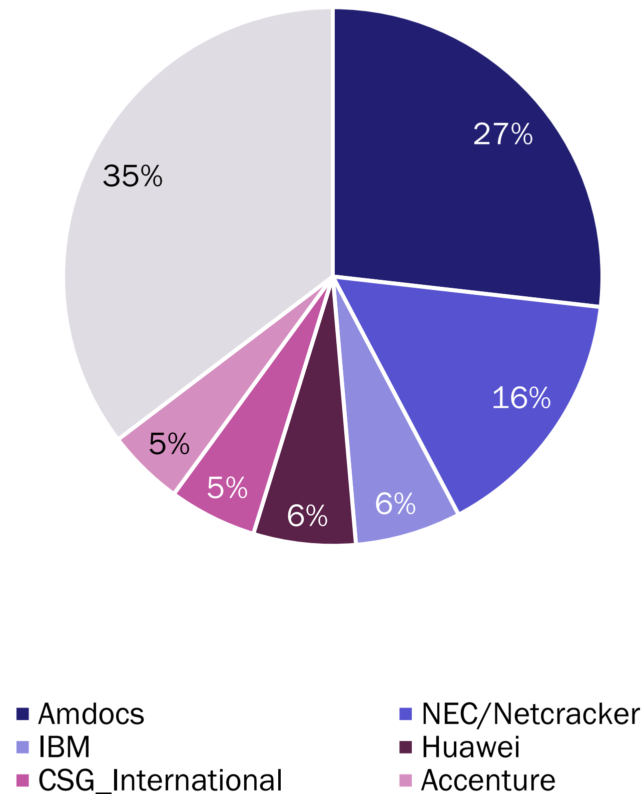
Billing and offer creation revenue market share

Figure 8: Billing and offer creation total revenue by type, worldwide, 2023



Source: Analysys Mason

Figure 9: Billing and offer creation total revenue by vendor, worldwide, 2023[1]

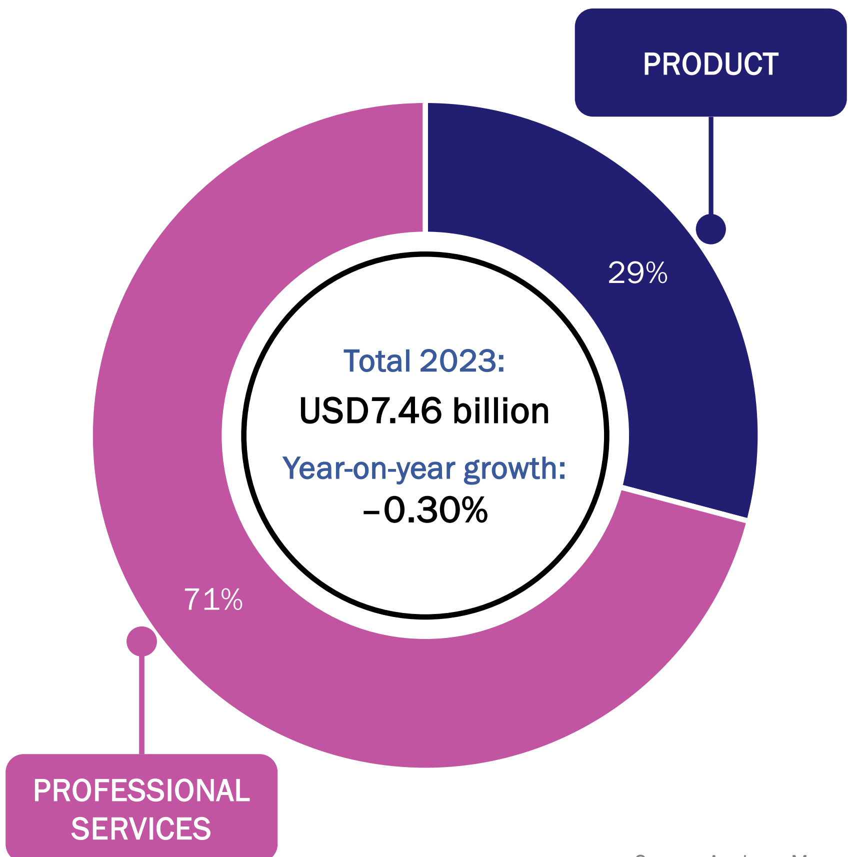


Source: Analysys Mason

[1] Other vendors include Cerillion, Infosys, Nokia, Optiva, Oracle, Tech Mahindra, Totogi, Zira and ZTE.

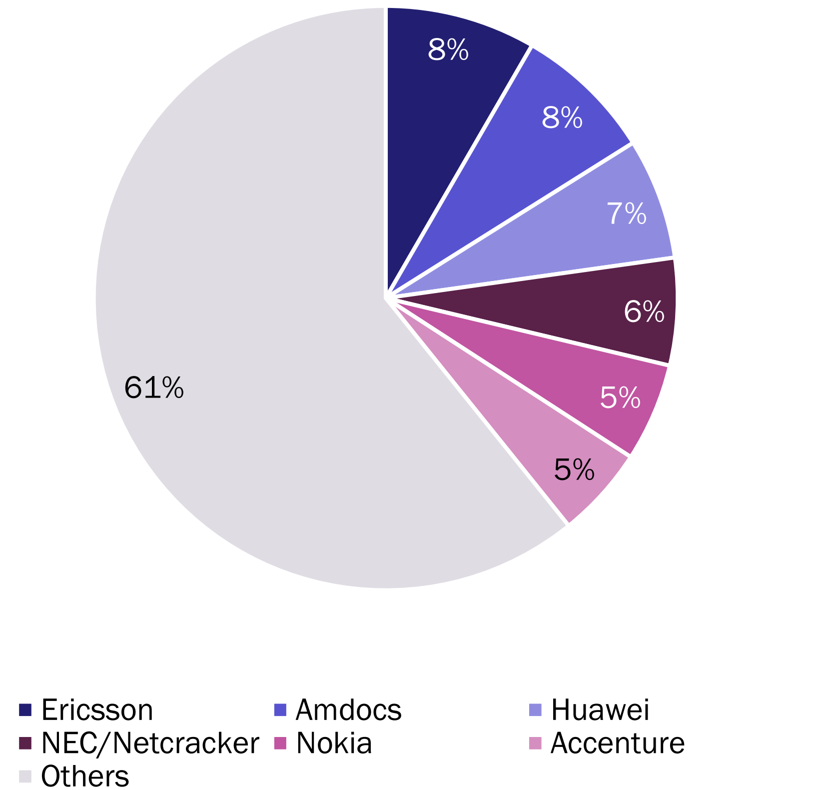
Charging, rating and policy management revenue market share

Figure 10: Charging, rating and policy management total revenue by type, worldwide, 2023



Source: Analysys Mason

Figure 11: Charging, rating and policy management total revenue by vendor, worldwide, 2023[1]

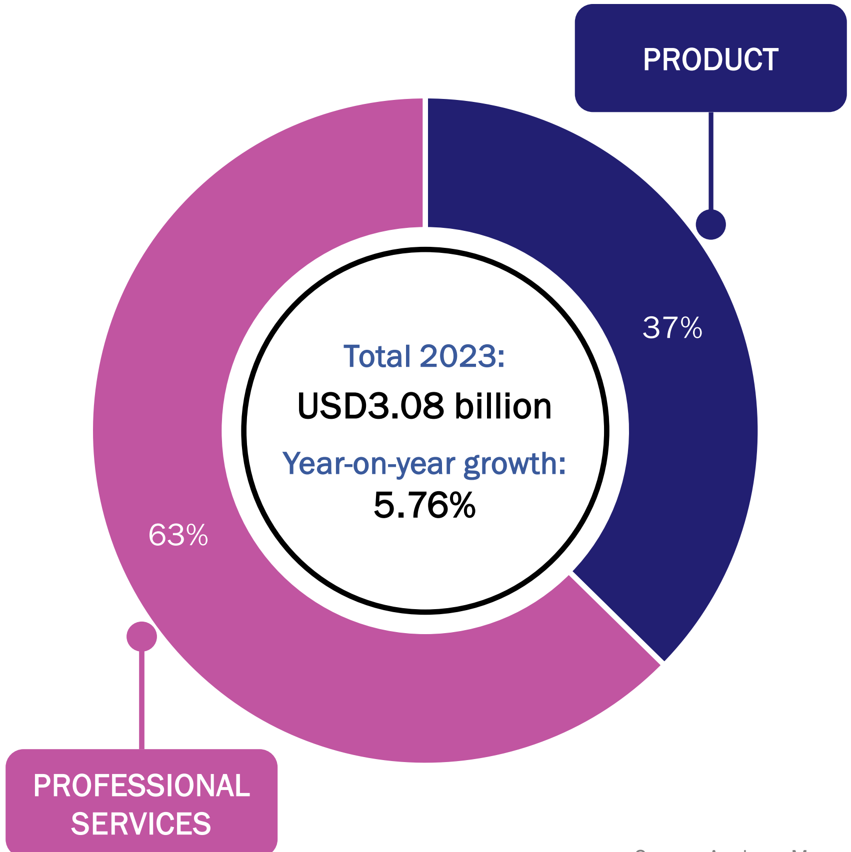


Source: Analysys Mason

[1] Other vendors include: Comviva, Matrixx Software, Nokia, Oracle and ZTE.

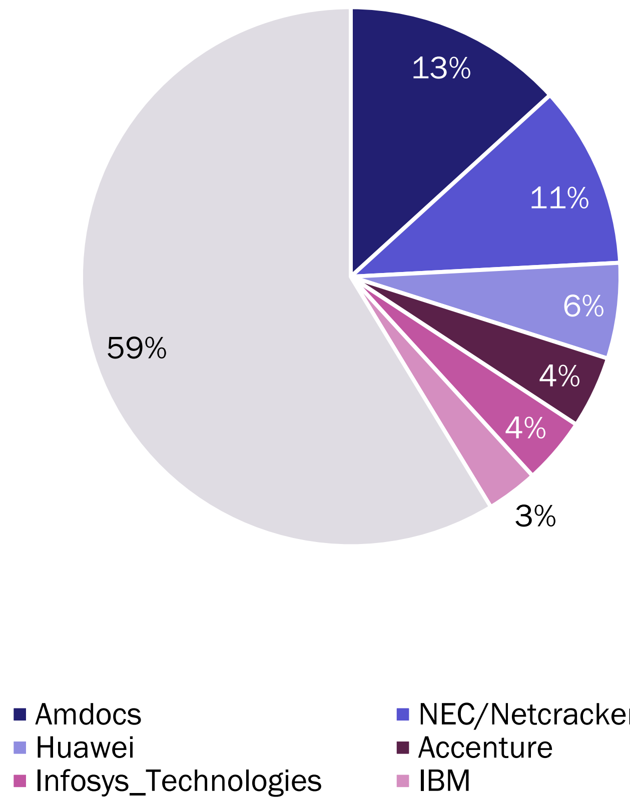
Partner management revenue market share

Figure 12: Partner management total revenue by type, worldwide, 2023



Source: Analysys Mason

Figure 13: Partner management total revenue by vendor, worldwide, 2023[1]



Source: Analysys Mason

[1] Other vendors include: Bango, BeyondNow, Boku, CSG, Dell, Flytxt, IBM, Salesforce, ServiceNow, Subex and Zira.

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 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 catalogue, network data analytics function (NWDAF), NEF and end-to-end orchestration functions.

Amdocs launched a framework (amAIz) in June 2023 that was developed using generative AI (GenAI). amAIz enables high-order automations to be created. Amdocs has also launched its next generation of inventory systems in readiness for next-generation networks.

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- and 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
Financial performance	▪ Total revenue in 2023: USD4.95 billion (+6.2% year-on-year) ▪ Total revenue by region: 67% from North America, 14% from Europe and 18% from the rest of the world ▪ Total revenue by vertical: 58% from managed services and 42% from other services
Key customers	Over 350 communications and media providers including A1, AT&T, Altice, Bell Canada, Bharti Airtel, Comcast, DISH Network, Globe, Lumen, PLDT, Rogers, Singtel, T-Mobile, Telefónica, Telkomsel, 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 and Amdocs ConnectX (SaaS Telco-in-a-box)

Source: Analysys Mason

Amdocs: analysis

Amdocs's monetisation suite enables CSPs to offer flexible billing and monetisation options to support customers' needs and preferences.

Amdocs is a leader in the monetisation platforms segment, and monetisation accounts for well over 50% of its telecoms-related revenue. Its cloud-native monetisation suite includes solutions for charging, billing, policy and revenue management for various industry verticals such as IoT, media, gaming and enterprise.

Amdocs plans to position its monetisation suite as the extensive, all-inclusive option for leading-edge CSPs with large operations, as well as for smaller providers. It has positioned its Digital Brands Suite as an alternative for Tier-3–5 CSPs and MVNO/Es, especially in emerging markets. Amdocs has extended its billing capabilities to include real-time billing, flexible monetisation models in a single system that can bill anything and an interactive bill experience for customers.

Amdocs has over 300 CSP customers worldwide. The top ten customers account for 65% of Amdocs's revenue, which highlights the vendor's role in the Tier-1 CSP segment, especially in developed regions. Several Tier-1 CSPs in North America have integrated Amdocs Freestyle Billing to improve their customer experience and drive operational billing efficiency. Telefónica Móviles in El Salvador selected Amdocs's charging platform as part of its transformation.

Strength	Description
Global footprint	Amdocs serves over 350 communications, pay-TV, entertainment and media industry service providers in 85 countries. It has a strong base in North America, where all major CSPs use its services.
Technological capabilities	Amdocs has evolved its portfolio to be a fully cloud-native, 5G-compliant (3GPP Rel17), open and modular microservices-based platform. It will continue to enhance its product and service offerings with low-/no-code tooling and AI/ML capabilities to support business-led agility.
Broad portfolio of services	Amdocs has a diverse customer base supported by a broad portfolio of product offerings and solid professional services.

Source: Analysys Mason

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