

# **Telecom Billing and Revenue Management Market by Solution (Software (Mediation, Billing and Charging, Revenue Assurance, and Fraud Management) and Services), Deployment Type, Telecom Operator Type, and Region - Global Forecast to 2024**

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## **Abstracts**

“Growing number of cellular/mobile subscribers to drive the telecom billing and revenue management market growth”

MarketsandMarkets projects the telecom billing and revenue management market to grow from USD 10.8 billion in 2019 to USD 18.0 billion by 2024, at a Compound Annual Growth Rate (CAGR) of 10.8% from 2019 to 2024. Telecom billing and revenue management solutions meet the needs of mobile and fixed-line Communication Service Providers (CSPs), analog data networks, digital data service providers, and triple/quadruple-play enterprises. These solutions help operators increase their revenue by extracting unbilled revenue, leveraging automation to identify revenue leaks, and safeguarding revenue streams from potential losses. They also help telecom operators reduce the time-to-market for new service offerings and improve customer experience with real-time charging. As the revenue from legacy services is declining, operators are embracing new business models with innovative services and new partners, such as Over-the-Top (OTT) service providers and content aggregators. Billing and revenue assurance solutions enable smart revenue sharing among partners, thereby improving business relationships, reducing the total cost of ownership, and offering a fast time-to-market, which ultimately leads to an increase in revenue.

“By solution, the software segment to account for a higher market share during the forecast period”

By solution, the software segment is expected to hold a higher market share than the services segment during the forecast period. Telecom billing and revenue management providers offer single/standalone or integrated billing and revenue management software. These offerings help operators analyze, evaluate, and optimize each phase of the life cycle, and provide complete insights and intelligence into the revenue relationships of customers and service providers. The major telecom billing and revenue management software include mediation, billing and charging, partner and interconnect management, revenue assurance, and fraud management. These software are robust and provide real-time analytics capabilities, enabling early detection of telecom frauds and ensuring service providers to predict and calculate the service impact, even on complex network topologies. There are several vendors available in the market that offer telecom billing and revenue management solutions as standalone modules or an integrated platform.

“By software, billing and charging segment to hold the largest market size during the forecast period”

The convergence of fixed and mobile networks has compelled operators to launch cross-service offerings and more innovative pricing packages, thereby encouraging them to move away from solely prepaid or postpaid plans to hybrid account structures that support both scenarios. The efficient billing and charging solution helps service providers monetize opportunities presented by converged networks and embrace new business models. It enables them to capture and secure revenue streams and take advantage of business opportunities from both the traditional telecom services as well as digital services, 5G, and Internet of Things (IoT). Hence, the billing and charging solution enables operators to support different lines of businesses on a single platform by aggregating data from numerous billing tools and generating a single invoice. The solution consolidates all the financial transactions associated with customer billing accounts over a certain period into a single bill. It helps service providers exchange billing data and invoices, and share revenue or cost information with partners, thereby empowering operators to maintain billing accuracy and improve customer experience by enabling the end-to-end management of disputes and adjustments.

“By region, Asia Pacific to grow at the highest CAGR during the forecast period”

The market in the Asia Pacific (APAC) is projected to grow at the highest CAGR during the forecast period, owing to the increasing adoption of 4G Long Term Evolution (LTE) that is driving the demand for telecom billing and revenue management solutions in this region. The major countries such as China, India, Australia, and Japan, would witness

high growth rates in this region. APAC demonstrates a combination of high growth, developing economies, and increasing adoption of mobile and internet. The enormous population in the region has led to an extensive pool of subscriber base for telecom companies. Vast and diverse geographies and large subscriber base are the two main factors leading to intense billing and revenue complexities for the telecom operators in the region. According to a report published by GSMA, titled The Mobile Economy Asia Pacific 2018, there were 2.8 billion unique mobile subscribers in APAC in 2018. The high number of mobile subscribers in the region has led the Communication Service Providers (CSPs) to invest in standardized telecom billing and revenue management solutions that can adapt to the changing product and competitive landscape with minimum customizations. Some of the major telecom companies operating in the region include China Mobile, Reliance Jio, NTT Docomo, and Airtel.

The breakup of the profiles of the primary participants is given below:

By Company Type: Tier 1 – 15%, Tier 2 – 40%, and Tier 3 – 45%

By Designation: C-Level – 40%, Director Level – 35%, Managers–15%, and others -10%

By Region: North America – 45%, Europe – 15%, APAC – 30%, and RoW – 10%

The following key telecom billing and revenue management vendors are profiled in the report:

Amdocs (US)

Netcracker (NEC Corporation [Japan])

CSG Systems International (US)

Oracle (US)

Ericsson (Sweden)

Huawei (China)

Cerillion (UK)

Mahindra Comviva (India)

Optiva (Canada)

Comarch S.A. (Poland)

Nokia (Finland)

SAP (Germany)

HPE (US)

Openet (Ireland)

TEOCO (US)

Intracom Telecom (Greece)

Enghouse Networks (Canada)

Nexign (Russia)

Bearing Point (Netherlands)

FTS (Israel)

Subex (India)

Sterlite Technologies (India)

Tecnotree (Finland)

Zuora (US)

Apttus (US)

## Research Coverage

*Telecom Billing and Revenue Management Market by Solution (Software (Mediation, Billing and Charging, Revenue...*

The telecom billing and revenue management market is segmented into solutions (software [mediation, billing and charging, partner and interconnect management, revenue assurance, and fraud management] and services [professional services and managed services]), telecom operator types (Mobile Operators [Mobile Network Operator (MNO), Mobile Virtual Network Operator (MVNO), and Mobile Virtual Network Enabler (MVNE)], Internet Service Providers [ISPS], satellite communication providers, and cable network providers), deployment types (on-premises and cloud), and regions. A detailed analysis of the key industry players has been undertaken to provide insights into their business overviews; services; key strategies; new service and product launches; partnerships, agreements, and collaborations; business expansions; and competitive landscape associated with the telecom billing and revenue management market.

### Reasons to Buy the Report

The report would help the market leaders and new entrants in the following ways:

It comprehensively segments the telecom billing and revenue management market and provides the closest approximations of the revenue numbers for the overall market and its subsegments across different regions.

It would help stakeholders understand the pulse of the market and provide information on the key market drivers, restraints, challenges, and opportunities in the market.

It would help stakeholders understand their competitors better and gain more insights to enhance their positions in the market. The competitive landscape section includes a competitor ecosystem, new service developments, partnerships, and acquisitions.

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SIZE, BY TELECOM OPERATOR TYPE, 2017–2024 (USD MILLION)

TABLE 102 PARTNERSHIP, 2018–2020

TABLE 103 NEW SERVICE LAUNCHES AND SERVICE ENHANCEMENTS, 2019

## About

The business processes in the telecom sector include a wide spectrum of activities ranging from planning, acquiring and analyzing data, and providing services to billing and customer care activities. Telecom companies use various business support systems (BSS) and services to assist them in efficient handling of the business operations with minimum resources and higher profitability. These solutions and services which include customer management, billing and revenue management, and product management are provided by a large number of companies in the market.

### Objectives Of The Study

- To define and measure the Telecom Billing and Revenue Management (TBRM) market in terms of software, service, deployment type, and region
- To analyze the market structure by identifying various sub-segments of the TBRM market
- To forecast the TBRM market and its various submarkets with respect to five regions, namely, North America (NA), Latin America (LA), Europe, Middle East and Africa (MEA), and Asia-Pacific (APAC)
- To identify major trends and factors driving or inhibiting the growth of the TBRM market and its various submarkets
- To strategically analyze each submarket with respect to individual growth trends and contribution to the overall TBRM market
- To analyze opportunities in the TBRM market by identifying high-growth segments of this market
- To strategically profile the key players in the TBRM market and comprehensively analyze their products and core competencies in the market
- To track and analyze competitive developments, such as, venture capital funding, joint ventures, mergers and acquisitions, and the overall competitive ecosystem in the TBRM market

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