



Selected market share report

Monetisation platforms: worldwide market shares 2024

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About this report

This report provides market share data for telecoms operator spending on telecoms-specific monetisation platforms software systems and related services for 2024. It provides details of how the spending varied by delivery model, vendor and region. The report also includes profiles of the leading vendors in the market.

It is based on several sources, including:

- interviews with operators and vendors worldwide
- Analysys Mason's research conducted during the past year.

GEOGRAPHICAL COVERAGE

- Worldwide
- Central and Eastern Europe
- Developed Asia-Pacific
- Emerging Asia-Pacific
- Latin America
- Middle East and North Africa
- North America
- Sub-Saharan Africa
- Western Europe

QUESTIONS ANSWERED IN THIS REPORT

- What was the overall size of the market (monetisation platforms software systems for the telecoms industry) and what drove this spending among telecoms operators?
- Who are the major vendors and what is their share of revenue in the monetisation platform systems market?
- What are the different drivers and growth rates of operator spending on products and professional services?

WHO SHOULD READ THIS REPORT

- Vendor strategy teams that need to understand where growth is slowing or increasing across different sub-segment categories
- Product management teams that are responsible for feature functionality and geographical focus, and product marketing teams that are responsible for market share growth
- Market intelligence teams at vendors that want to understand how their competitors compare with each other
- Telecoms operators that are planning digital transformation journeys and want to ensure that their current vendors are staying up to date

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The monetisation platforms market stalled during most of 2024, but growth returned in the final quarter of the year

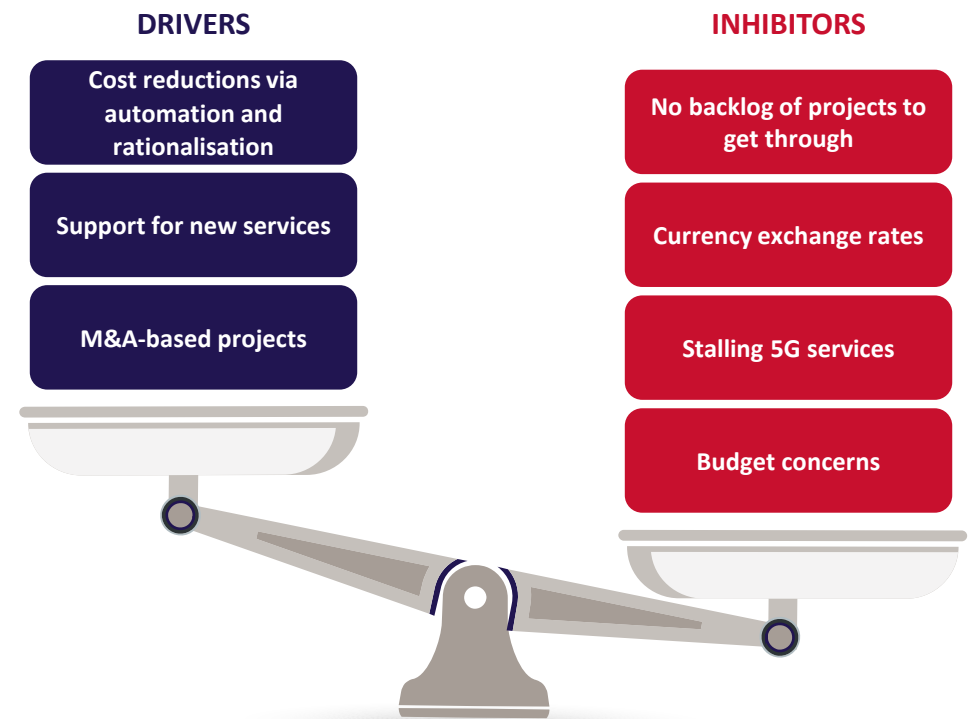
There was limited year-on-year growth in the monetisation platforms market in 2024. This was due to the following factors, among others.

- The high revenue growth in 2023 caused by the backlog of demand and projects following the pandemic made it hard to grow revenue further in 2024.
- Reporting in US dollars meant that revenue fell in Japan, New Zealand and South Korea by over 10%. Additionally, revenue in some countries in Africa fell significantly in US dollars; for example, the Nigerian naira depreciated by over 100% relative to the dollar.
- Ongoing challenges with the monetisation of 5G services has reduced the demand for new 5G service offerings.
- Software vendors increased their product revenue, but professional services revenue fell. There is some evidence that software vendors grew their share of the professional service market at the expense of the system integrators.

Nonetheless, there were some growth drivers, such as increased interest in the use of AI, self-service and, critically, the need to support new services. These included IoT, 5G slicing and digital services offerings.

Mergers and acquisitions also led to further projects such as Rogers acquisition of Shaw Communications, and Virgin Media of O2 in the UK.

Figure 1: Drivers and inhibitors of growth in the monetization platforms market, 2024



Source: Analysys Mason

The desire to support new services is main reason for telecoms operators to implement new monetisation platforms, followed by cost reductions

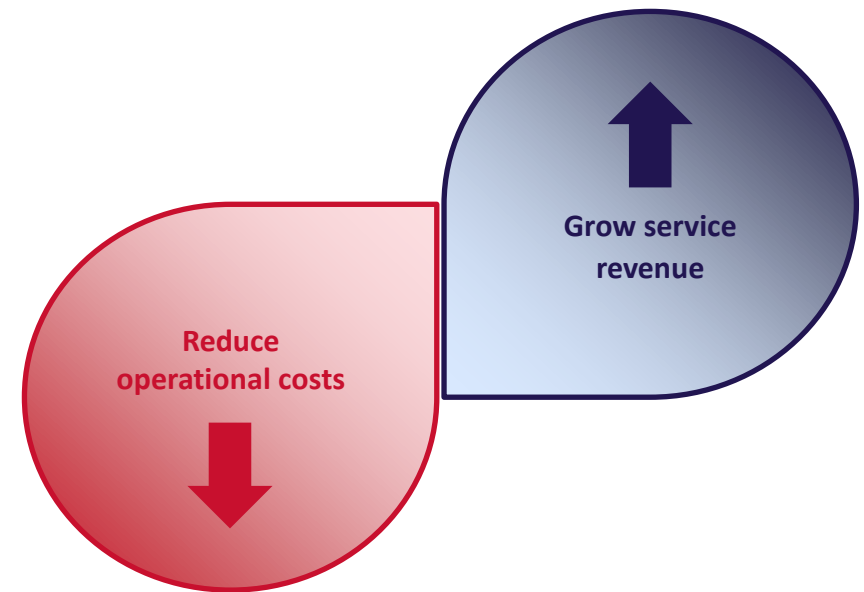
The desire to launch new types of services is the main driver of telecoms operators' monetisation platform upgrades (cited by 80% of survey respondents).¹ Operators believe that new monetization systems will help them to capitalise on new network capabilities, including support for 5G standalone (SA)-based services, such as slicing.

The next-most cited reasons to upgrade were the need to mitigate high operating and maintenance costs and to overcome performance issues with inefficient legacy systems (both cited by 33% of respondents). These motivations can be service-dependent; lower-margin services such as IoT often require lower operational costs to run than consumer or business services.

Running fewer systems is seen as highly desirable when reducing complexity and costs, but only 40% of survey respondents had fully consolidated their systems by implementing a convergent charging system. Consolidation requires resources and funding, which provide growth for vendors in the short term, but will have a longer-term effect of reducing costs for telecoms operators.

53% of telecoms operators in our survey are considering upgrading their monetisation platforms via adjunct charging systems and running them in parallel for different service types and brands.²

Figure 2: Two key reasons for telecoms operators to implement new monetisation platforms



Source: Analysys Mason

¹ Data from Analysys Mason's survey of telecoms operators in June 2024 in which operators were asked what their top-three reasons were for upgrading their monetisation systems. ² Data from Analysys Mason's survey of telecoms operators in June 2024 in which operators were asked if they were considering an upgrade with an adjunct to their core systems

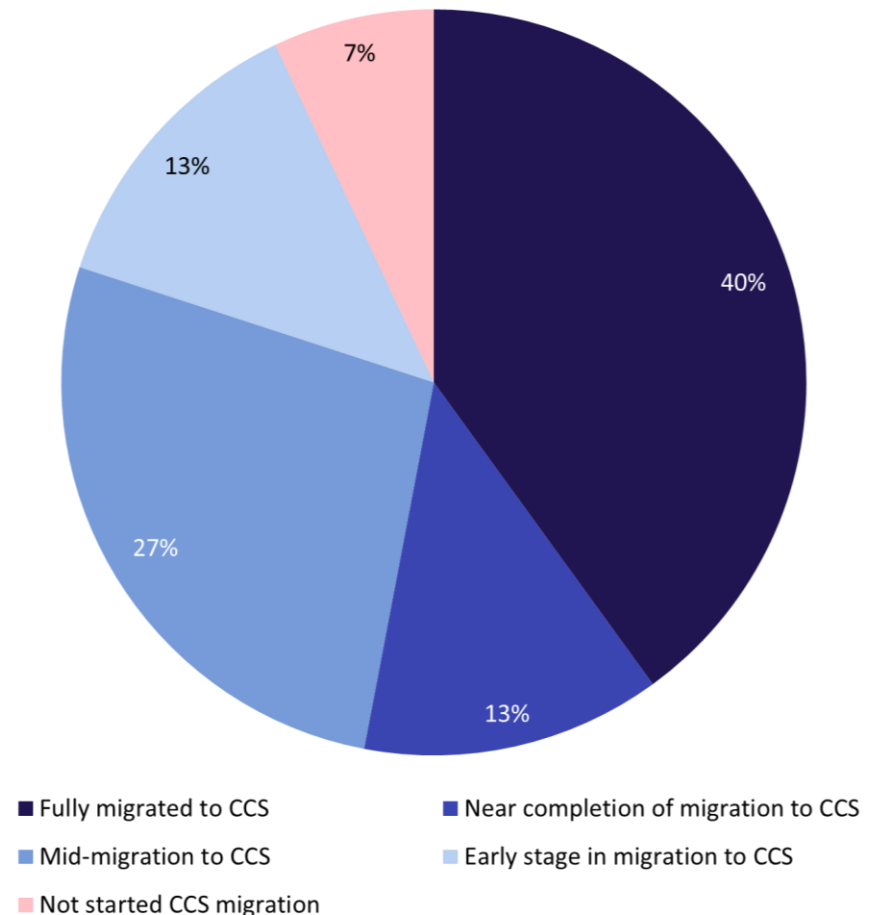
The roll-out of 5G in mature markets has slowed, thus reducing the demand for associated charging systems

The roll-out of 5G infrastructure has slowed down significantly, which in turn has affected upgrades to core network functions, including charging systems. This slowdown is primarily due to a lack of market demand for 5G SA services, particularly for capabilities such as network slicing. As a result, telecoms operators have decelerated both their 5G infrastructure deployments and the corresponding charging system upgrades.

Instead, telecoms operators are shifting their focus to reducing operational costs. Many are now rationalising their multiple charging systems, with some aiming to consolidate to a single vendor. After years of discussion, convergent charging systems (CCS), which offer the ability to run all services in one system, are finally being implemented. A key goal of this rationalisation process is to achieve significant cost savings, which could reduce the overall market size. Indeed, these system transformations are often catalysed by the need to avoid imminent and expensive hardware updates.

The market is also being shaped by intense competitive pressure. The cost of solutions is being driven down as billing vendors and network equipment vendors continue to compete for business. This benefits those operators that wish to modernise their systems more affordably.

Figure 3: Operators' plans for running a CCS, 2024¹

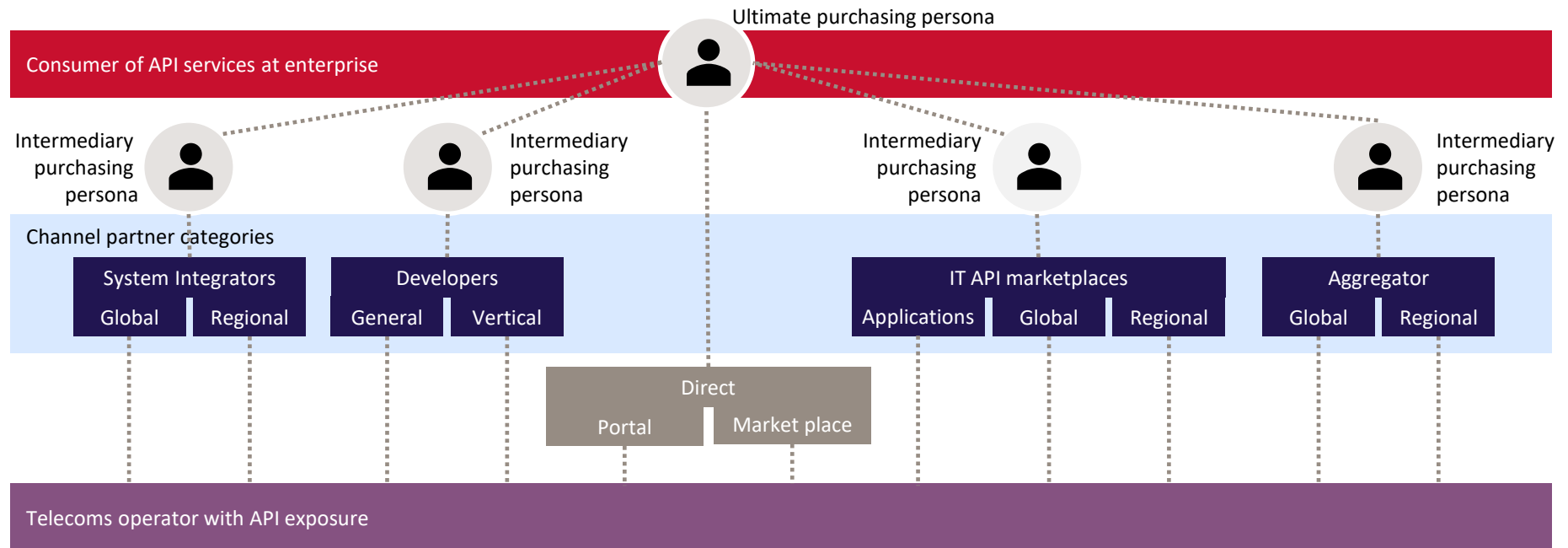


Source: Analysys Mason

¹ Data from Analysys Mason's survey in 2024. Question: "Do you consider running a single/fewer charging systems to be a priority? Is running different charging systems depending on service types acceptable?"

Operators must implement partner ecosystems to address the demand for APIs and digital services to support both direct and indirect channels to enterprises

Figure 4: Different personas existing within in-direct and direct channels



Source: Analysys Mason

Partner management revenue increased in 2024 because telecoms operators added new service propositions by reselling partners' content and capabilities. Deals were also being announced, towards the end of 2024, to support the exposure of new APIs, which operators are planning to implement using the CAMARA standards.

API exposure adds complexity to supporting the indirect selling of access and related data. Furthermore, the expectations of the developers (who demand simple on-boarding, fast access and to easily understood capabilities) are new to many operators.

Recommendations

1

Telecoms operators should continue to rationalise their monetisation platforms where practical and where significant savings or new revenue can be generated or customer experience can be improved.

Telecoms operators need to consider factors beyond the architectural simplicity of a single monetisation platform for all service types. Time to market, cost of operations and integration between billing, charging, partner management and other systems, for example, may be more significant factors driving their business objectives. This may require the use of adjunct systems to support new requirements, though this would add complexity to their systems architecture.

2

Telecoms operators must continue to upgrade and seek out new monetisation capabilities to support new service types beyond traditional connectivity.

Being able to rapidly launch and develop new services beyond connectivity-based services, as well as the technical capability to support 5G SA, are critical factors for effective monetisation. Operators should ensure that the charging and billing systems that they adopt are able to support the complexity presented by changing environments in cloud, partner ecosystems and new networks standards, and have the right balance between adaptability and dependability.

3

Vendors must build greater automation into each operational process. Such automation is needed to provide cost reductions, improved agility and revenue growth.

Vendors need to help operators to balance two key goals: accelerating new service creation and reducing operational costs. This can be achieved by using technology to automate core processes.

- AI/generative AI (GenAI) can improve process automation.
- No-/low-code tools enable staff to support new services without programming skills.
- Tightly integrated monetisation systems components reduce deployment costs.

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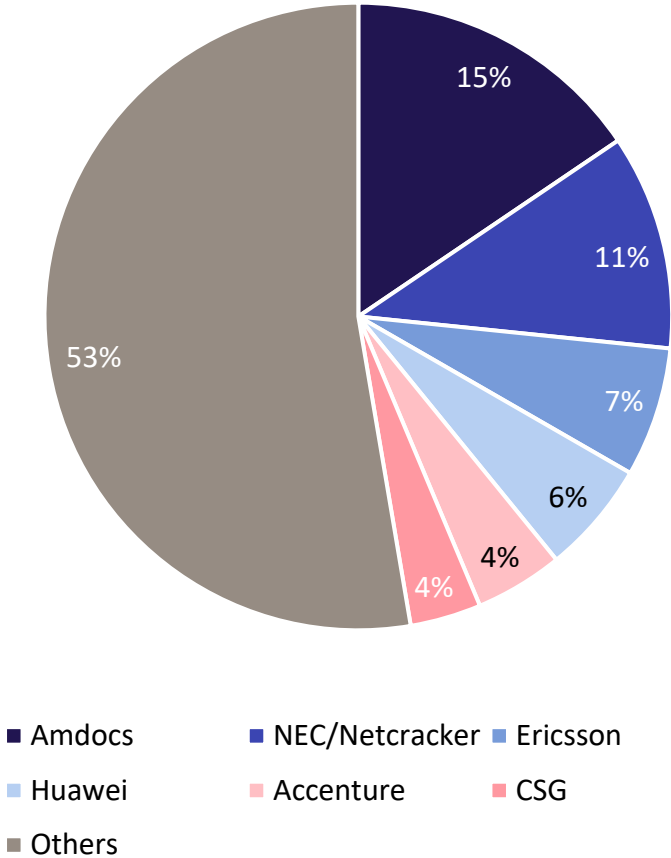
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Monetisation platforms revenue market share

Figure 5: Monetisation platforms total revenue by vendor, worldwide, 2024



Amdocs is a major player in the telecom monetisation market, with monetisation products and services accounting for more than half of its telecom-related revenues.

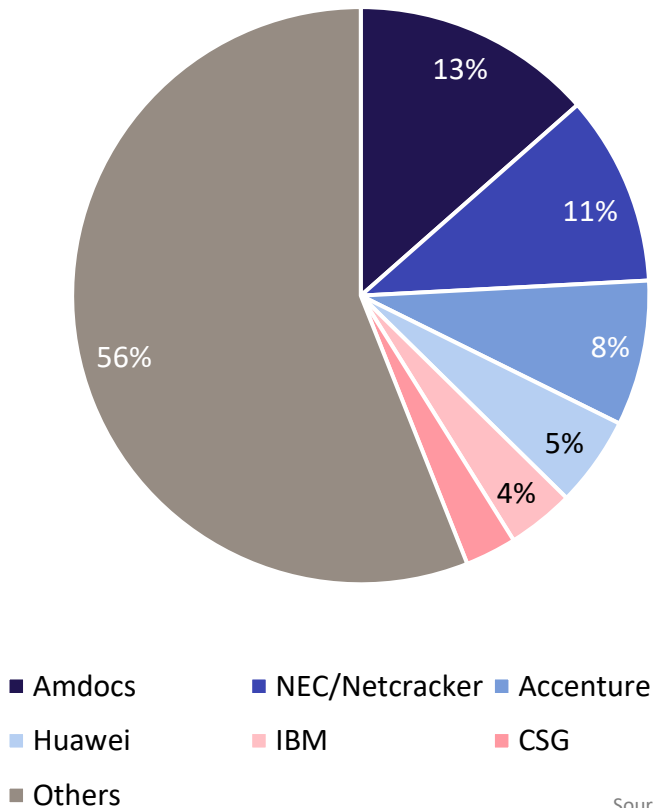
The company offers a comprehensive portfolio that includes SaaS-based cloud-native solutions with connectX, Amdocs Freestyle Billing, and real-time billing platforms, while Amdocs Billing Experience enhances customer satisfaction by improving engagement around invoicing.

In addition, the company provides policy management, charging, and partner management solutions. Amdocs also supports customers with a broad services offering, both within monetisation and beyond, to help address their transformation, operational, AI, and data requirements.

Source: Analysys Mason

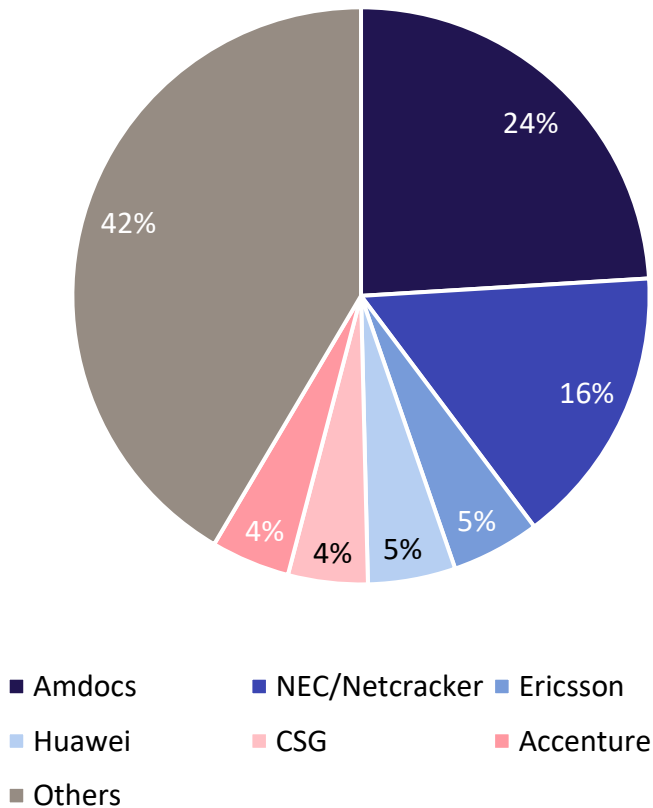
Billing and offer creation revenue market share

Figure 6: Partner management total revenue by vendor, worldwide, 2024¹



Source: Analysys Mason

Figure 7: Billing and offer creation total revenue by vendor, worldwide, 2024¹



Source: Analysys Mason

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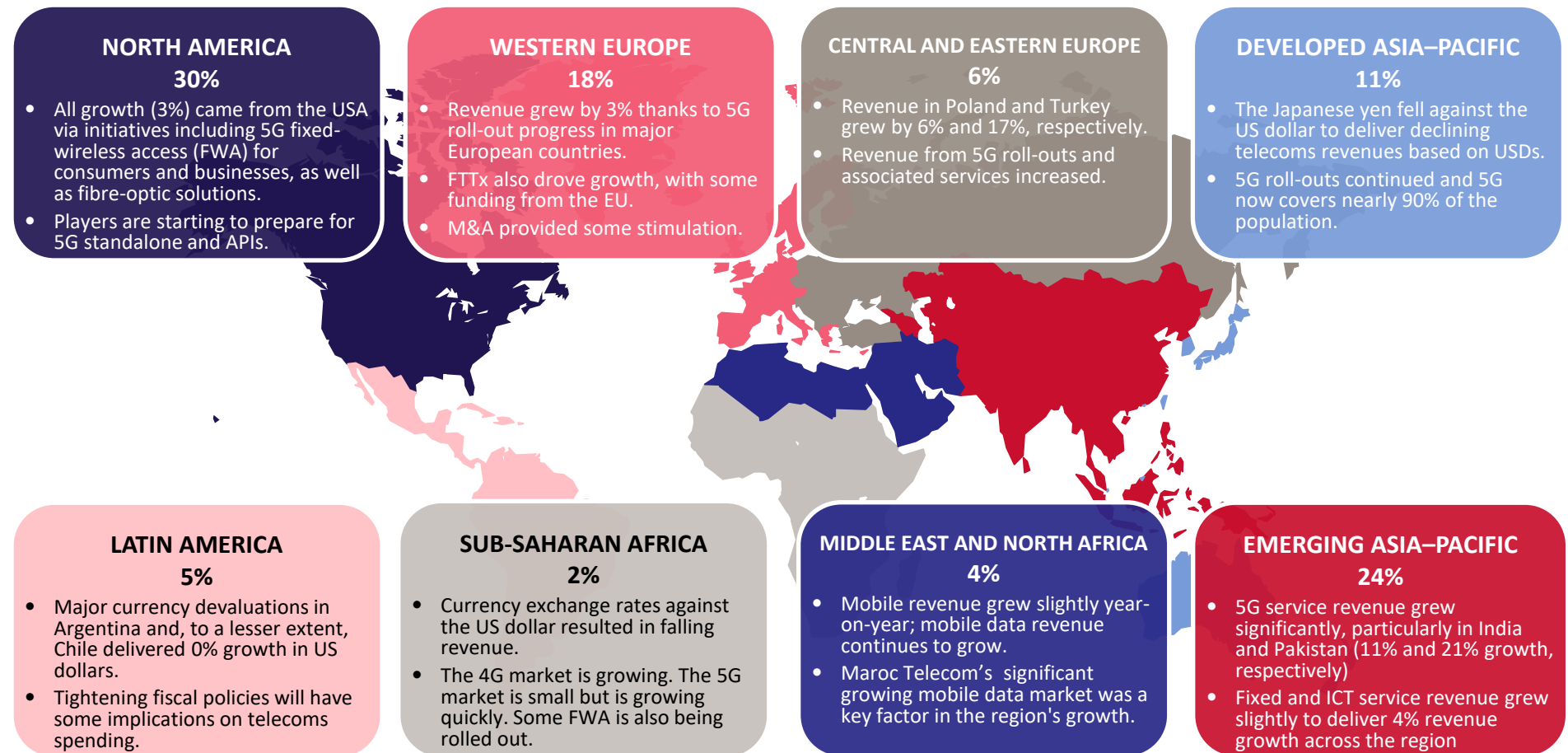
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Overall telecoms services: revenue split and trends for regional markets

Figure 8: Share of worldwide USD1.51 trillion telecoms service revenue and trends by region, 2024



Source: Analysys Mason

Overall telecoms services: regional service breakouts

Figure 9: Metrics for the eight regions modelled individually and worldwide, 2024¹

	Telecoms revenue (USD billion)				Total telecoms revenue		Mobile revenue as share of GDP		Fixed revenue as share of GDP		Mobile SIM population penetration (%)	Fixed broadband population penetration (%)
	Mobile	IoT	Residential fixed	Business fixed	Value (USD billion)	Year-on-year change	Value (%)	Year-on-year change	Value (%)	Year-on-year change		
North America (NA)	260	3.3	116.2	53.5	476	+3%	0.82	−1%	0.62	−5%	129	86
Latin America (LATAM)	50	0.7	21.5	11.4	74.8	0%	0.72	−4%	0.49	−8%	106	60
Western Europe (WE)	118	1.9	68.1	34.2	276	+3%	0.54	−2%	0.60	−3%	131	86
Central and Eastern Europe (CEE)	39	1.0	11.1	7.1	65.9	+6%	0.61	−5%	0.33	−6%	131	67
Developed Asia–Pacific (DVAP)	90	1.4	30.2	18.1	160	−2%	0.91	−4%	0.62	−3%	134	90
Emerging Asia–Pacific (EMAP)	272	5.9	47.2	32.2	372	+4%	0.97	−1%	0.29	0%	96	66
Middle East and North Africa (MENA)	46	0.47	11.4	9.3	64.8	+4%	1.04	+1%	0.5	+2%	117	47
Sub-Saharan Africa (SSA)	33	0.18	2.9	1.7	25.2	−5%	1.72	+4%	0.25	+14%	88	5
Worldwide	911	15.1	309	168.0	1478	+2.5%	0.82	−1%	0.5	−2%	103	62

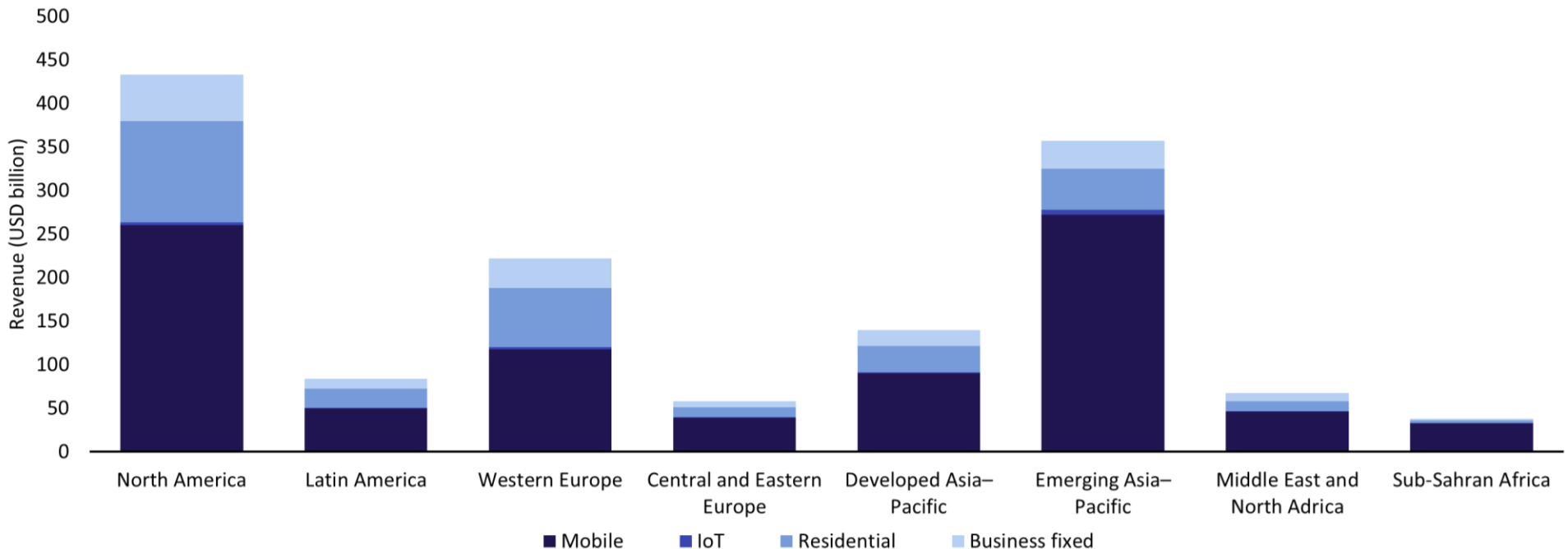
Source: Analysys Mason

Telecoms revenue as a share of GDP has shrunk worldwide, despite absolute growth. This is due to inflation and falling prices. Some currencies in SSA, DVAP and EMAP have fallen against the US dollar, leading to a decline in revenue in US dollars. Spending in these markets was notably weaker than in 2023, particularly where systems integration services were required; projects were delayed, re-specified or cancelled. Spending in MENA remained robust thanks to support from governments' wider digital agendas. Service revenue growth in Poland (13%) helped to deliver overall revenue growth in CEE. Similarly, revenue growth in Pakistan and India (23% and 10%, respectively) drove overall growth in EMAP.

¹ Figures from Analysys Mason's [DataHub](#).

Overall telecoms services: regional service comparison

Figure 10: Overall retail telecoms service revenue by region and service type, 2024¹



Source: Analysys Mason

North America was the largest market for telecoms services worldwide, but emerging Asia-Pacific was the largest market for mobile services. This reflects the revenue growth from mobile internet and other related services in China and India. Fixed-line services were a significant revenue stream in Western Europe and North America, which reflects the ongoing roll-out of FTTP/B in many countries as the demand for high-speed fibre-based services continues. There is a close correlation between service revenues and operational systems budgets from which operational applications are procured. In the shorter term, professional services are affected; the effect on software systems is often delayed until the next financial year.

¹ Retail revenue for mobile/fixed services, excluding wholesale revenue (interconnection, hosting and roaming-in) and revenue from direct equipment sales. For more information, see Analysys Mason's [DataHub](#).

Overall telecoms services: industry drivers in 2024

Figure 11: Drivers of the telecoms software and services industry

Driver	Elements	Discussion
5G	- Impact of 5G non-standalone (NSA) and 5G standalone (SA) on operational systems - Support for Open RAN and associated cloud infrastructures - Support for new 5G service capabilities	Investment in 5G is the primary driver of the telecoms software and services industry. These investments boost software spending for the network, network orchestration and automation, and OSS and BSS enhancements. Telecoms operators are preparing and launching 5G SA services. Open RAN is gaining more focus from major operators. Smarter operational systems are required to manage complex new services, disaggregated networks and virtualised infrastructure.
Monetisation of next-generation and 5G services	- Support for 5G SA services including slicing. - Support for the monetisation of network capabilities using APIs - Support for digital ecosystems of partners and digital marketplaces	5G has not yet realised the anticipated revenue growth. Operators could gain revenue from 5G slicing for enterprise services, but must enhance order management, charging and billing systems to improve the customer experiences. Moreover, telecoms operators seek developer community support to devise more attractive solutions via API exposure (including the CAMARA GSMA OpenAPI standards) and inventive tariffs.
IT stack consolidations and transformation	- IT transformations due to the shift to the cloud - Simplification of applications into larger integrated platforms - Shift to SaaS business models	Transformations centred on fewer, larger application platforms with broader functional scope are creating opportunities. The maintenance costs and time spent on multiple vendor point solutions are driving operators to simplify their operational fabrics, thereby reducing operational costs and enhancing agility.
Hyper-automation and AI/generative AI (GenAI)	- Transformation of operational systems and processes based on AI and GenAI capabilities - Upgrade of applications to support new use cases - Development of new automations and integration with the current operational fabric	GenAI has reignited AI investments. Operators that are aiming to transform operations are seeking AI-driven technological innovations for process automation. Investments in data manipulation frameworks, application development, insight generation and infrastructure for AI use cases are emerging. AI is being integrated into existing applications and licensed by operators.
M&A and consolidation	Rationalising systems after a merger or acquisition	Telecoms operators that dispose of assets or purchase new ones must rationalise their OSS and BSS.

Source: Analysys Mason

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Amdocs: strategy overview

Amdocs is the leading provider of monetisation software products and services in telecoms.

Amdocs is trusted by leading telecom operators, with a focus on tier 1’s, for its monetisation products and services. It develops, implements, and manages proprietary and third-party software, offering services that support the full-service lifecycle and system transformations.

Launched in 2022, Amdocs Freestyle Billing gives operators an agile monetisation approach with low/no-code tools for bill experience configuration. Its real-time billing architecture enables instant responses to events and customer actions. This universal billing solution for B2C, B2B, and B2B2X integrates Gen-AI and machine learning, now featuring agent-based intelligence. Amdocs charging uses AI to help business users design, launch, and recommend optimal offers. AI-driven charging improves update cadence, scalability, cost control, reliability, and responsiveness.

Amdocs’s connectX is a SaaS-based, cloud-native digital BSS with pre-built customer journeys for care, commerce, ordering, billing, and charging – tailored for digital brands, Tier 2/3 operators, MVNEs, and MVNOs.

Amdocs APIx-Change enables and monetises APIs, including onboarding, charging, syndication, AI/ML monitoring, and consent control.

Figure 12: Data about Amdocs

Company details	- Founded in Israel in 1982 - Headquartered in Chesterfield, Missouri, USA 29 000 employees in 30 countries
Revenue	- Total revenue in FY2024: USD5.0 billion (+2.4% year-on-year (–1.6% in calendar year) - Total revenue by region: 65% North America, 16% Europe and 19% rest of the world
Key customers	Over 400 communications and media providers including A1, AT&T, Bell, BT, Charter, Clairo, Comcast, Dish, Globe, KT, Lumen, Maxis, Movistar, Optus, Rodgers, Singtel, T-Mobile, Telefónica, TELUS, Verizon, Vodafone and XL Axiata.
Partnerships	AWS, Apple, Google Cloud, Dell, KMS Lighthouse, Lightico, Microsoft, NVIDIA and RedHat.
Professional services, products and solutions	Monetisation suite: Amdocs Freestyle Billing (FSB), Amdocs Real-time Billing (RTB), Amdocs Bill Experience (BE), Amdocs Charging (CH), Amdocs Policy (PO), Others Invoicing (INV), Accts Receivable (AR), Collection (COL) Customer Number Management (CNM), Amdocs Partner Management, APIx-Change Amdocs ConnectX (CONX) Amdocs Catalog Amdocs eSIM Cloud Amdocs MarketONE Digital Identity Management Subscription billing, Digital Partner Management

Source: Analysys Mason

Amdocs: analysis

Amdocs's monetisation suite enables telecoms operators to offer flexible billing and monetisation options to support customer needs and preferences based on different service models.

Amdocs is a leader in the monetisation platforms segment with monetisation solutions accounting for over 50% of its revenue. Its cloud-native monetisation suite includes solutions for charging, billing, API monetisation, policy and revenue management for various industry verticals such as IoT, media, gaming and enterprise. Solutions are powered by amAlz, Amdocs GenAI suite, to improve automation, efficiency and customer experience.

Amdocs has positioned its monetisation suite as an extensive, all-inclusive option for leading-edge telecoms operators. Amdocs extended its billing capabilities to include real-time billing in 2021 to support flexible monetisation models in one universal biller and an interactive bill experience for customers.

Amdocs's proposition, although built around products, is primarily focused on its services, which support telecoms operators through their migrations, integrations and transformations of current systems, services and infrastructure. The software products are sold through a consultative-based sales process, which has encouraged long-term customers and enables a deep understanding of their needs and requirements. This has helped ensure their top 10 customers account for 65% of Amdocs's revenue. North America operators are their most significant customers through there revenues did shift a little to Europe last year.

Figure 13: Amdocs strengths and weaknesses

Strength	Description
Strong reputation	Amdocs has a very strong reputation for the delivery of complex projects at scale. Amdocs has 72+ deployments of Amdocs Charging, making it one of the largest providers of the technology. In addition, billing deployments are estimated to be 100+.
Broad footprint	Amdocs products provide the most comprehensive set of services and products in the market.
Technically advanced	Amdocs has consistently adopted and implemented IT and service-related technology early within the market. It has 10 live 5G SA customers for charging and over 20 customers for charging delivered on cloud.
Focus on Tier 1 needs	Although far from exclusively targeting large Tier 1 operators their solution can scale to meet the complexities found at Tier 1 operators with their solutions.
Weakness	Description
Perception of cost being high	Although not necessarily the case as it once was, Amdocs's costs are perceived to be relatively high
Heavy services play	Amdocs products are best delivered through using their own staff and associated services. It does not have a strong reseller channel or active partner-channel.
Large telecoms operators	Heavy reliance on two customers for 47% of revenue.

Source: Analysys Mason

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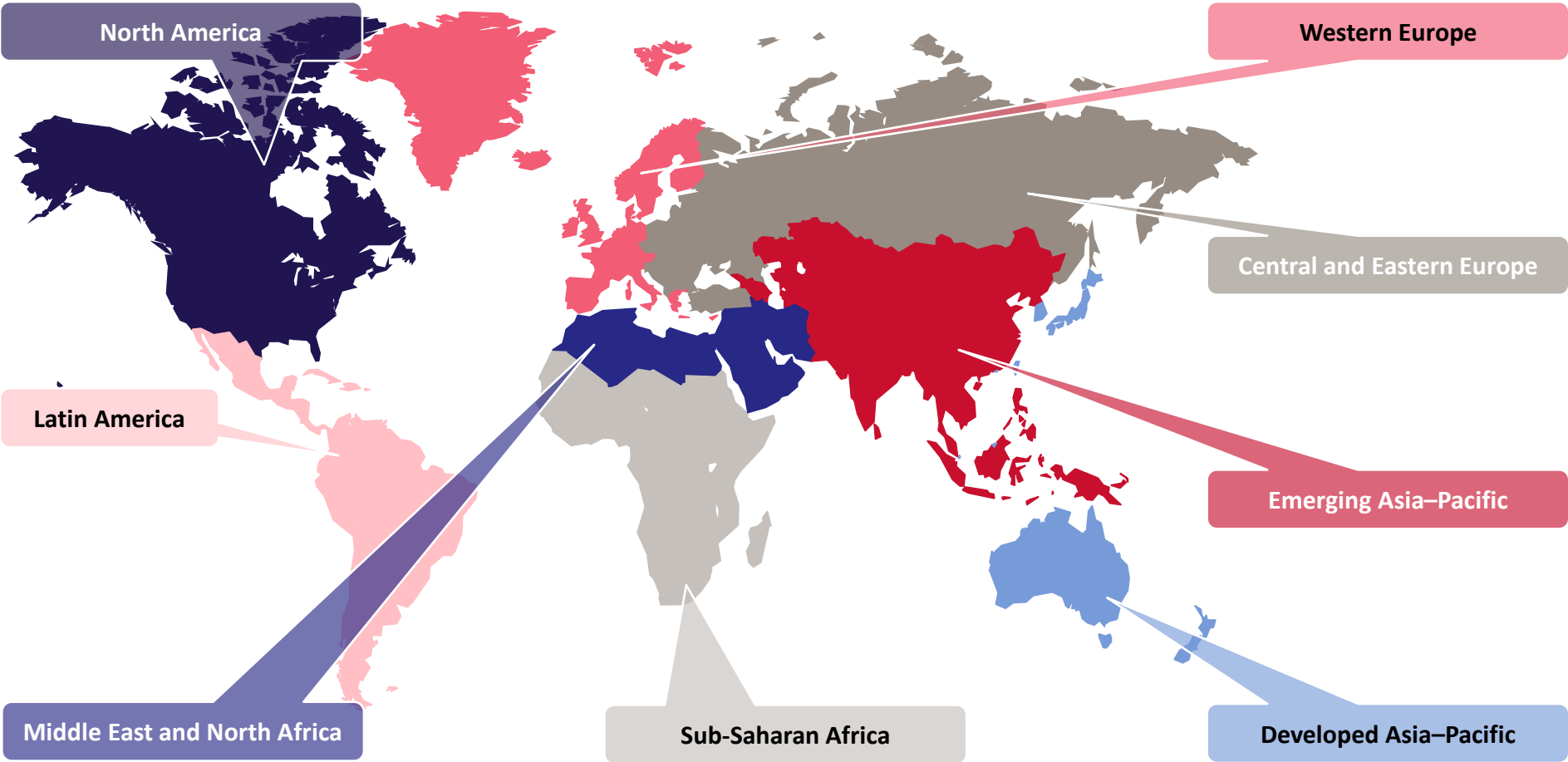
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Definition of geographical regions

Figure 14: Regional breakdown used in this report



Monetisation platforms definitions

Figure 15a: Definition of monetisation platforms and its sub-segments

Segment/sub-segment	Definition
Monetisation platforms	Monetisation platforms include billing and charging systems, partner management and interconnect systems and policy management systems with mediation systems tracked. These systems enable telecoms operators to create and track the use of their services, aggregate their records, compute charges, produce bills and process payments. The integrity of these systems is fundamental to operators’ ability to set, collect and manage revenue for services and products.
Billing and offer creation	The billing and offer creation domain receives processed and rated call data record (CDR) files from the core network charging and rating functions. It includes functions that can provide billing and billing of other chargeable items (for example, handsets, security applications and handset insurance). Billing traditionally was only applicable to offline charging, whereas real-time or online charging was for prepaid solutions. Convergent billing allows for a combination of charging (convergent charging), and billing systems will need to support both. Telecoms billing is the process of collecting usage data, aggregating it, applying required usage and rental charges, and finally generating invoices for the customers. Telecoms billing processes also include receiving and recording payments from the customers. Billing systems work with charging and rating engines through the interfaces such as Bx in the 3GPP standards. Billing also includes bill presentment and collection and performs calculations for adding or removing any tax due. More recently, billing information is being used with generative AI (GenAI) to dynamically create new offers based on usage and other factors discovered in data- and revenue-related outcomes.

Monetisation platforms definitions

Figure 15b: Definition of monetisation platforms and its sub-segments

Segment/sub-segment	Definition
Charging and rating	This sub-segment is formed of three different types of systems. • Prepaid billing deployments are only used by retail subscribers that credit their account before using a service. The credit is debited in real time as the service is used, and service is denied if the balance falls to zero. Subscribers have various means of ‘topping up’ their balances. Prepaid service systems must be able to rate service usage in real time and maintain a real-time account balance. They must also be able to interact with the network to redirect subscribers to top-up servers if the account balance drops to zero. Note that convergent platforms used purely for prepaid use cases are considered to be prepaid. • Postpaid billing deployments are used by retail subscribers that are billed each month for the service they have used. Traditionally, postpaid billing systems work offline, using a monthly billing cycle. Modern postpaid billing systems include the ability to monitor usage in real time and have enhanced capabilities, such as advice of charges. Postpaid billing includes rating events and combining the rated events with other aspects of the bill, including recurring charges, taxes, fees and other items that are independent of rated usage. Note that convergent platforms being used purely for postpaid use cases are considered to be postpaid. • Convergent billing deployments support both prepaid and postpaid subscribers. They may also support hybrid accounts in which, for example, a family has a single account and some members of the family use prepaid, while others use postpaid accounts. Policy management is the practice of applying traffic management techniques using rules based on subscriber profiles. Profiles and rules are defined centrally and distributed to the policy enforcement points in the network to control a subscriber’s traffic. In 3GPP standards, policy management is implemented by the policy and charging rules function (PCRF), and policy enforcement by the policy and charging enforcement function (PCEF). We exclude policy enforcement products from our definition of policy management, which focuses on the PCRF and its various proprietary enhancements.
Partner management	Partner management monetisation platforms are used for payments to, and collections from, service providers that co-operate with an operator to provide services to its customers. This includes traditional voice termination (both fixed and mobile), roaming interconnection and interfaces (but not roaming service bureaux per se) and international route optimisation and settlements with traditional network operator partners and content providers.

Monetisation platforms definitions

Figure 15c: Definition of monetisation platforms and its sub-segments

Segment/sub-segment	Definition
Mediation (not included in this report)	Mediation systems collect data from the network, format it and store it for specific uses, generally for billing systems, but also for various types of service assurance. The mediation sub-segment now includes active mediation, which was previously included in the real-time charging (RTC) sub-segment of our service delivery platforms segment. Mediation systems are not specifically covered in our market share data and reports.

Definitions: product

Figure 16: Definition of product revenue

Revenue type	Definition
Product	Product revenue also includes revenue from product-related services, such as installation, training and lifecycle management services related to a specific telecoms software deployment. This category also includes professional services related specifically to a supplier’s own product. These are services that only the product supplier will be able to provide in nearly all cases. Services related to third-party products are part of the systems integration sub-category. Product revenue also includes revenue from product-related services, such as installation, training and lifecycle management services related to a specific telecoms software deployment. This category also includes professional services related specifically to a supplier’s own product. These are services that only the product supplier will be able to provide in nearly all cases. Services related to third-party products are part of the systems integration sub-category.

Definitions: professional services [1/3]

Figure 17a: Definitions of professional services revenue and its sub-categories

Revenue type	Definition
Professional services	Professional services revenue includes all software-related service revenue that is not explicitly tied to software products. This includes revenue from hosted/cloud, outsourced operations and systems integration and other services. These definitions include all the professional services that we previously covered, but we have adjusted the definitions of particular areas to embrace cloud as a way to provide hosted IT services and to reduce the number of distinct sub-segments for professional services.
Hosted/cloud	Revenue from hosted/cloud delivery services includes that that is attributed to the vendor that hosts the product for the operator. The product can be supplied by the vendor using its own or third-party infrastructure. The product can be delivered through a private traditional or cloud-based site, or on a public cloud.
Outsourced operations	This category accounts for revenue that is associated with managing systems for telecoms operators. It includes business process outsourcing (BPO). This category also includes revenue generated from outsourced operations that are professional or specialist services provided by external suppliers' human resources to operate and maintain an operator's assets, which can include all related operational responsibilities. This involves the transfer of operations from an operator to external suppliers. In this scenario, the assets (systems and software) are owned by the operator and reside in the operator's environment and the supplier manages the network from an operator co-located site or other local or regional (for example, regional NOC) site. It includes responsibility for onsite operations and related activities in a particular country or region.
Systems integration and other professional services	This category covers all new development that is carried out uniquely for the operator. This includes business consulting, design consulting, custom development and systems integration. Overall, systems integration accounts for the largest proportion of professional services, although any of the other areas may be the focus in any given deal.

Definitions: professional services [2/3]

Figure 17b: Definitions of professional services revenue and its sub-categories

Revenue type	Definition	
Systems integration and other professional services	Systems integration	Systems integration concerns the services required to manage and deliver major telecoms software projects in the OSS, BSS, NFV/SDN software and other applications areas to meet operators' specific requirements. These are services that go beyond the boundaries of a single product or suite (such items are covered in the product-related services segment), and involve other systems in the operator environment in order to meet the project's requirements. This category includes, but is not limited to: • integration with third-party (other vendor or proprietary) data sources, systems and interfaces, including VNF onboarding and data analytics/AI-driven automation applications • data loading and migration • customisation and configurations of software extensions and modules (without coding) to provide customised software features and capabilities, such as network equipment adapters, point-to-point interfaces and enterprise application integration (EAI) • detailed requirements, technical specifications and detailed designs • integration testing, not normal unit and functional system testing, such as for the integration of open multi-vendor components into a full stack solution (for example for open RAN implementations) • project management services. Services related to third-party products (not owned by the supplier) are included in this systems integration sub-category.
	Business consulting	Business consulting describes advisory services in the areas of business process, workflows, organisation issues and strategic planning, such as how to enter a market or how to package a service. This includes, but is not limited to transformational strategy, business case development and ROI modelling, business process re-engineering and optimisation, organisation restructuring, optimisation and change management, assisting operators to develop new products and services to deliver to their subscribers (ranging from tariffs to value-added services), go-to-market strategies, regulatory compliance review and reporting requirements and marketing and campaign strategies.

Definitions: professional services [3/3]

Figure 17c: Definitions of professional services revenue and its sub-categories

Revenue type	Definition	
Systems integration and other professional services	Design consulting	Design consulting describes the provision of advisory design services prior to the implementation of a telecoms network, software and/or system in such areas as OSS, BSS and virtualised network or cloud architecture, automation, network planning and optimisation and data or information models. These services typically contribute towards developing requirements for procuring the systems and software needed. This category includes, but is not limited to network planning and optimisation designs for both fixed and mobile networks and their transition to virtual/hybrid networks, OSS, BSS, cloud and data analytics platforms, and integrated architectural design, developing technical requirement for tender documents, high-level migration plans and roadmapping, analysis of established systems, data modelling, high-level interface definitions and designs.
	Custom development	Custom development refers to telecoms software that is written specifically for an individual telecoms operator, typically as a result of its ownership of legacy and proprietary systems, software or interfaces. It includes any development that requires coding to meet an unusual requirement, such as the development of a customised application store on an SDP or Microsoft .NET platform, an API for interfacing with legacy or proprietary systems, data migration scripts and custom plug-ins for VNF or NFV/SDN-related functional integration. This is internal development that is typically performed by large operators. The spending in this category only includes operator spending on paying other firms for custom development, not the spending required for their own staff to do custom development. This includes some applications development management (ADM).

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About the author



Justin van der Lande (Research Director) leads the *Operational Applications* practice. He specialises in business intelligence and analytics tools, which are used in all telecoms business processes and systems. In addition, Justin provides technical expertise for Analysys Mason in consultancy and bespoke large-scale custom research projects. He has more than 20 years' experience in the communications industry in software development, marketing and research. He has held senior positions at NCR/AT&T, Micromuse (IBM), Granite Systems (Telcordia) and at the TM Forum. Justin holds a BSc in Management Science and Computer Studies from the University of Wales.

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