# TABLE OF CONTENTS

1. **EXECUTIVE SUMMARY** ................................................................. 3  
   1.1 Key Findings ............................................................................. 3  
   1.2 Companies Profiled .................................................................. 5  

2. **THE CHANGING TELECOM BILLING LANDSCAPE** .................... 6  
   2.1 The Central Challenge: Matching OTTs ....................................... 6  
   2.2 The Challenge of Digital Transformation ...................................... 7  

3. **ELEPHANTS IN OR NEAR THE ROOM: IOT & 5G** ....................... 10  
   3.1 IoT's Implications: The Eve of Adoption ..................................... 10  
   3.2 The Growing Shadow of 5G .................................................... 13  

4. **DILEMMAS & TECHNOLOGIES** .................................................. 14  
   4.1 Revenue Management & Its Discontents: Sprawl vs. Convergence ... 14  
   4.2 Base Technologies: The Roles of Virtualization & Elastic Capacity ... 16  
   4.3 Up, Up & Away: Billing in the Cloud ......................................... 18  
   4.4 Public vs. Private: Your Cloud or All of Ours? ............................ 18  

5. **PLAYERS & CHALLENGES: THE BUSINESS SIDE** ................. 22  
   5.1 The Growing Importance of Partners & Ecosystems .................... 22  
   5.2 Getting There From Here: Execution vs. Lip Service .................... 22  
   5.3 Focusing on the New While Profit Stays With Old ....................... 23  
   5.4 Billing: Lightning Rod/Scapegoat for End-User Complaint? .......... 23  
   5.5 The Ambiguous Role of Billing Vendors ...................................... 24  
   5.6 Consolidations: Glued Together or Set for Life? .......................... 24  
   5.7 Regulatory Challenges ............................................................ 25  

6. **VENDOR PROFILES** ................................................................. 26  
   6.1 Amdocs ..................................................................................... 26  
   6.2 Aria Systems ........................................................................... 27  
   6.3 Cerillion .................................................................................... 27  
   6.4 Comarch ................................................................................... 28  
   6.5 CSG International ................................................................. 29  
   6.6 Ericsson ................................................................................... 31  
   6.7 Netcracker Technology ............................................................ 33  

**TERMS OF USE** ......................................................................... 34

Use of this PDF file is governed by the terms and conditions stated in the license agreement included in this file. Any violation of the terms of this agreement, including unauthorized distribution of this file to third parties, is considered a breach of copyright. Heavy Reading will pursue such breaches to the full extent of the law. Such acts are punishable in court by fines of up to $100,000 for each infringement.

For questions about subscriptions and account access, please contact support@heavyreading.com.

For questions and comments about report content, please contact Heavy Reading at reports@heavyreading.com.