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# Service Management Industry Analysis: Sample

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# Why Sell to Mobile and Converged Operators?

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- In '06 the number of mobile customers exceeds 2B, number of fixed line customers is 1.3B (source: InStat)
  - Cable has roughly 180M customers worldwide
- Worldwide carrier revenue is \$1.25T in '05, compared to Cable's roughly \$100B (source: Insight)
  - Mobile revenue growth roughly 9% (source: Nokia)
- Relative Mobile / Cable OSS spend estimates vary between 10-20
  - Sources: OSS Observer and Yankee

# A Mature Competitive Jungle

	Wireless	Wireline	Cable
Billing CRM	AMDOCS, Convergys	AMDOCS, Convergys	AMDOCS, Convergys
Provision, Activation	Ericsson, Nokia, Evolving Systems, Comptel, Metasolv, (+7 others)	Metasolv, Crammer, Axiom, Syndesis (+8 others)	Jacobs Rimmel, Ceon, C-Cor, Sigma Systems
Inventory	Telcordia, Comptel, (+10 others)	Telcordia, Crammer, Axiom, (+7 others)	Telcordia, Crammer
Mediation	Evolving Systems, Telcordia, Metasolv (+8 others)	Metasolv, Telcordia, Syndesis (+7 others)	HP, Telcordia

# Mobile Competitor Taxonomy

## CRABS



BEA, AMDOCS  
Syndesis, Axiom,  
Cramer

## INCUMBENTS



Ericsson, Nokia,  
Evolving Systems,  
Telcordia, Comptel,  
Metasolv



NetCracker, Jacobs  
Rimmel, Ceon,  
Interactive  
Enterprises

Intec, Cerillion



## UPSTARTS

## ALLINONES

# External Competitive Mapping

## System Integrators

Accenture, EDS, HP,  
IBM, Siemens,  
Business Edge + many  
local SIs

## IMS / SDP

Tekelec, Lucent, Cisco,  
Ericsson, Nokia,  
IBM/Nortel, Motorola,  
Siemens, Telcordia,  
HP, Ubiquity, AePONA,  
Appium, Infinitel,  
Telenity, Redknee

## Portfolio Management

Celona, Tribold

Resell competitors,  
bespoke software

Bundle and extend  
service creation into  
service management

Emergent segment  
targeting bundling

Service Fulfilment Segment

Removes silo  
problem

Leverage  
incumbency

Interconnect  
support systems  
and silos

## Subscriber Databases

Lucent, Apertio (Moto),  
Bridgewater (Alcatel,  
Nortel, Starent), HP,  
Alcatel, Ericsson and  
Nokia

## Billing and CRM

AMDOCS, Sentori,  
Convergys, Intec,  
Cerillion

## Middleware

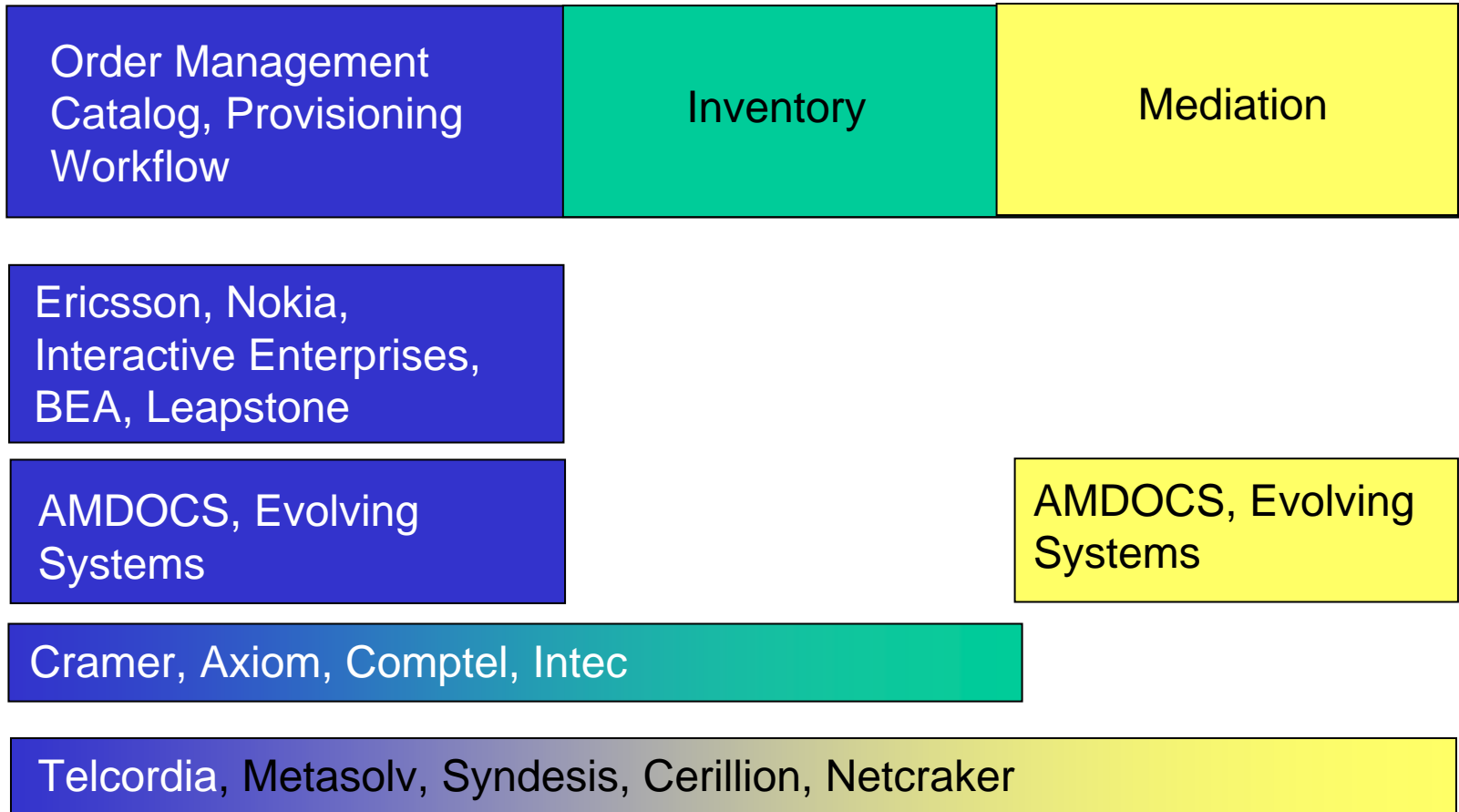
BEA, Kabira, Tibco,  
Sonic Software, Vitria,  
WiPro

# Competitive Mapping Within Service Management

<p><b>DSL</b></p> <p>Syndesis, Motive, Axiom</p>	<p><b>IP Services (VoIP, IPVPN, IPTV)</b></p> <p>SuportSoft, Leapstone, Cramer, JacobsRimel, Intelliden, Atreus</p>	<p><b>SI Built</b></p> <p>Wisor, WiPro</p>
<p><b>Fixed/Wireless</b></p> <p>Telcordia, Evolving Systems, Metasolv, Clarity</p>	<p><b>Assurance</b></p> <p>Vallent, Agilent</p>	<p><b>Inventory Management</b></p> <p>NetCraker</p>
<p><b>Cable</b></p> <p>Interactive Enterprises, Ceon, Comptel, C-Cor, Sigma Systems</p>	<p><b>Network Management</b></p> <p>TTI Telecom</p>	<p><b>Order Management</b></p> <p>Formula Telecom Solutions, CSG, ConceptWave</p>

# Competitive Product Mapping

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# Emerging Architecture (OSS/BSS Centric View)

**Billing:** RT Charging (prepaid non IN based), Revenue Assurance, Interconnect and Settlement, Fraud Management, Rating & Pricing, Mediation

**Customer Management:** Trouble Ticketing, CRM & Analytics, Subscriber Management, Subscriber Assurance

**Service / Network Assurance:** Performance Management, Fault Management, Test and Measurement, Service Management (SLA)

**Service Fulfilment:** Network Resource Management, Activation, Engineering and Planning, Inventory, Automated Service Delivery

