

## Telecoms Bust

2001 Nokia announces a mere 60% increase in sales – world reels!

\$1 trillion \$1 trillion flushed away – Telecoms built it, but they didn't come.

## Gold Rush

Late 1990s

At the height of the billing bonanza there were over 150 suppliers of billing systems and some that had never sold a single system were valued at over \$1 billion.

## Easy Pickings

\$250 million \$250 million sitting in a suspense file.

## RA Golden Years

2003 - 2005

The focus changed and suddenly finding the money that had been left lying around during the rush for customers became critical. This was the birth of revenue assurance in the telecoms industry.

I went back to my office and 'saved the company \$23 million.'

A Revenue Assurance Manager for every department in the company.

Revenue Assurance part of the new product development team and gave them a 'veto' over new product launches.

## Maturity

2005 - 2008

Improving processes, measuring processes and improving them again.

“Find the laziest person you can to improve your processes, they are always trying to cut corners.”

“It is worth chasing leakage so long as it is economical to do so, no more.”

“If you identify lost revenue (to shareholders) you then have to fix the problem.”

“If Billing doesn't get into the habit of measuring the efficiency of the billing process, someone else will – and that is never good!”

## Business Assurance

## New Services

- Content
- Multiple Services
- Margin Management

Quality of Service

OTT Players

M2M

Real Time

Convergence

Payments

Apps

## Mobile Dashboards

## Cloud Trends

# The Data Explosion How do we manage the revenue?

## General

### Service Provider Revenues

\$1.79 trillion 2010  
\$1.91 trillion 2011

Source: Ovum

### Equipment owned by American adults



Source: Pew Research

© WeDo Technologies

## M2M

### Global business impact

worth \$4.5 trillion

Source: Machina Research

### M2M services

Generate 5% of CSP 2015

Source: Informa

### M2M traffic

BMW cars will generate 1 petabyte/day 2017

Source: telecoms.com

### M2M market

worth >\$65 billion 2015

Source: Informa

### Global mobile network connections used for M2M

108 million 2011

Source: Berg Insight

### M2M traffic

508 petabyte/month 2016

Source: Cisco Visual Networking Index

## Fraud



The global network security appliance and software market in 4Q 2011 grew:

+8% \$1.58 billion

### Global Market

grow \$6.7 billion 2016

Source: Infonetics

### Estimate of annual telecom fraud losses

\$40.1 billion

Source: cfca.org

© WeDo Technologies

## Billing Issues

### Mobile industry losses



Source: Juniper Research

© WeDo Technologies

## Mobile

### Mobile connected devices (2016)

>10.3 billion mobile data traffic 71% video

Source: Cisco Visual Networking Index

### Global mobile media revenues (2012)

\$150 billion

Source: Strategy Analytics

### Number of concurrent sessions per subscriber (2011)

+50%

Source: Forbes

© WeDo Technologies

## Mobile Commerce

### Global revenue estimates

Estimates of the size of the current worldwide mobile commerce market vary widely.

Gartner estimate

\$86 billion 2011

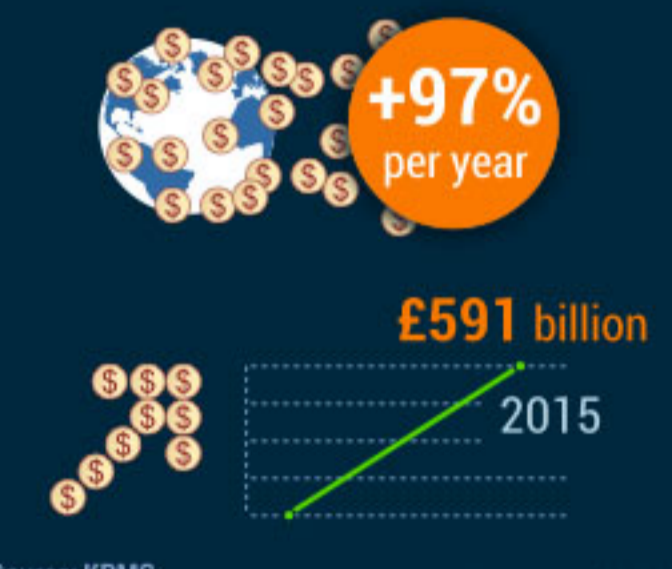
Juniper Research estimate

\$670 billion 2015  
\$240 billion 2011

© WeDo Technologies

## Mobile Payments

### Global mobile payments



Source: KPMG

© WeDo Technologies

## Regulation



Regulators



Customers

+Accuracy +Simplicity +Transparency

Regulators and customers demand greater accuracy, simplicity and transparency

© WeDo Technologies

## Changing Culture

### Impact of more analytics/marketing on RA

“By 2017, a CMO will spend more on IT than the CIO.”

Gartner Group

- IT being bought by business, not IT.
- Two thirds of CIOs now believe their business sees cloud computing as a way to circumvent IT.

Source: Forrester Consulting

© WeDo Technologies

## Impact

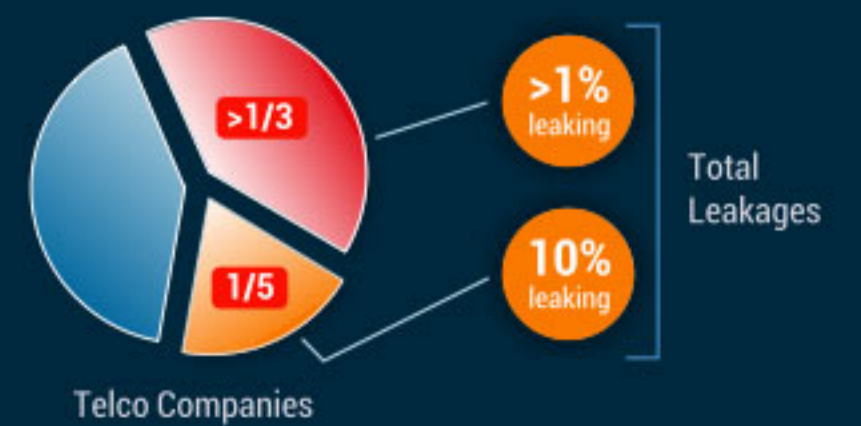
41% failing to identify more than half of total leakages.



Only 24% of RA departments are fully centralized.



More than a third of respondents' companies are leaking over 1% of total revenue – and a fifth are losing up to 10%.



Telco Companies

### Top three sources of revenue leakage:

- New transformational projects
- Poor system integration
- Fraud

© WeDo Technologies

## Business Intelligence

### Global business Intelligence software



Source: Gartner

52% say their senior management is not rewarded against RA performance



Source: KPMG survey