Optimizing costs and managing efficiencies in dispersed communications continue to challenge enterprises. Sourcing, procurement and vendor management leaders need TEM vendors that provide a cost-efficient solution to enable and support effective commercial management of communications services.

Overview

Key Findings

- Through the COVID-19 outbreak, and as organizations try to recover from the 2020 economic disruption caused by the global pandemic, enterprises are looking to cut hard costs, reducing like-for-like spend. Going forward, this will also add focus on softer cost savings for process improvements and keeping inventories up-to-date.

- Gartner client interactions show that end-user enterprises are looking for TEM providers to take control of more of the communications-related expenses, such as for mobile, wireline and cloud services. Alternatively, they want TEM providers to take on an increasing role in also offering life cycle management services for end user devices.

- Enterprises are increasingly looking for ongoing management as a key benefit of TEM; yet they experience challenges associated with inadequate process definition and reactive rather than proactive engagement models. This has led to dissatisfaction with the quality of the service and hidden costs.

- Some mobile tariff plans are now flat-rate-structured, with a significant amount of spend included. There are therefore fewer anomalies to detect, less optimization to execute and fewer changes. Such contracts are consequently easier to manage. Other contracts, such as those for WANs, are much more complex to manage.

Recommendations

Sourcing, procurement and vendor management leaders who execute on their IT services and solutions strategy and selection to identify TEM vendors should:
Market Definition

Telecom expense management (TEM) services enable enterprises’ IT, procurement and finance departments to order, provision, support and manage costs of large-scale corporate communications, associated IT services and their inventories (such as fixed and mobile telephony and data, cloud license tracking, and Internet of Things [IoT] connectivity). TEM services also include business intelligence (BI) and reporting suitable for supporting C-level strategic decision making. Gartner’s TEM coverage focuses on SaaS-based applications and platforms, managed services, and associated professional services.

Market Description

TEM providers are evolving their offerings as enterprises’ ranges of fixed (voice and data) and mobile devices grow and incorporate other services and communications-related asset tracking. These offerings include inventory tracking of cloud/consumption-based services; other IT-related services, such as unified communications and collaboration (UCC); voice over Internet Protocol (VoIP); and IoT expense management as enterprises embrace digitalization.

Enterprises are seeking to better manage this complexity and its associated costs, and consider third-party TEM providers to be the most cost-effective way to secure needed program management capabilities. Therefore, enterprises look to TEM providers with the capability areas illustrated in Figure 1. (For detailed definitions, see Note 2.)

Figure 1: The TEM Stack
**Market Direction**

Enterprise communications and IT services continues to grow, driven by more video usage, cloud-based services, and the use of IoT services as these and other services fulfill an increasingly enabling role for enterprises on their journey toward digitization. Enterprises use TEM services to optimize and manage the cost for communications services.

Additionally, some enterprises are also looking to TEM providers to manage a broader set of communications-related IT and cloud-based services. Also, some enterprises are also increasingly looking to TEM providers to provide full life cycle management, particularly of mobile assets (see Figure 2). The power of data analytics for more effective cost control, cost management and cost avoidance will continue to increase in importance, along with the quality of the service delivery.

**Figure 2. Telecom Expense Management Evolution**
Key trends in TEM:

- The vastly dominant commercial and engagement model is now a fully managed and outsourced TEM service delivered with cloud-based TEM applications. This is driven by digitization trends that place greater pressure on enterprise resources and governance to control budgets and services associated with managing communications, cloud-based applications and infrastructure, and emerging IoT services. Many organizations that previously managed expenses related to telecom and IT internally find there are more frequent changes to an increasingly complex environment while costs are scrutinized, consequently challenging internal enterprise entities to control costs efficiently, leading to the use of TEM services.

- Enterprises continue to show exploratory interest in vendors’ ability to track services, costs and inventories associated with UCaaS, IaaS, PaaS, storage, IoT and other IT assets, in addition to fixed and mobile, ideally from a single platform. Several vendors, such as Cass Information Systems, Tangoe and MDSL-Calero, also offer cloud capabilities.
Market Analysis

The TEM market is mature and commoditized, particularly in the U.S. Technical or functional differentiation between vendors can be limited; they may even seem indistinguishable. This leads to a strong focus on price competition. However, there is some differentiation in areas such as geographic reach and coverage, or on which services that can be managed, such as IoT or cloud. However, a main differentiating aspect is the service quality. This is evidenced by processes and methodologies that deliver consistency, reliability and continued efforts at managing the estate effectively.

Large domestic, regional and multinational enterprises are investing in TEM services. A key reason is that many enterprises struggle to rein in their communications service spend, which is forecast to represent 37% of global end-user spending on IT products and services in 2020 of just over $3.5 billion.

Of Gartner’s hundreds of TEM-related client inquiries in the 12 months leading up to August 2020, it is clear that the main benefits sought from TEM providers are improved business process outcomes, better visibility and control of assets, ensuring asset performance, and naturally reduced cost for the communication services under management. Organizations aim to have clarity around
costs and consumption of services for efficiency and optimization; by employing a TEM vendor, enterprises aim to save on internal resources while obtaining all this.

However, when sourcing a TEM vendor, differences in cultural and fragmented IT/telecom procurement environments can lead to long transition times, lower than expected total cost of ownership (TCO) reductions and hidden costs.

To reduce deployment challenges, enterprises should define roles and responsibilities on each side (internal to the organization and externally with the vendor) through a governance model covered in the contract. They should also clarify implementation schedules and the vendor’s ability to provide services needed in additional regions/locations and across different technology sets (as required). Enterprises should tie these into SLAs with target metrics (see Toolkit: Telecom Expense Management RFP Template). This will provide an understanding of how the vendor can drive efficiencies at scale and in complex landscapes.

Enterprise Requirements Vary by Size and Scope
The majority of Gartner’s end-user inquiries related to TEM in the 12 months prior to August 2020 have come from large multinational corporations (MNCs) or large enterprises with more than $1 billion in revenue. These organizations typically have complex national and international expense management requirements.

For enterprises with international requirements, there are a few providers with a large geographic presence, whereas others partner with third parties to cover a technical requirement or to complement geographic reach. During 2019, there was one acquisition to accomplish this (see Note 3). Still, the competitive landscape remains fragmented.

Interest in TEM continues to increase from midsize enterprises, which are looking to control costs and usage and to enhance processes around their growing number of consumption-based services and mobile services/devices. Note 4 provides examples of smaller TEM providers, mobile-only TEM providers, system integrators and IT outsourcers (ITOs) active in TEM.

Evolution of Procurement Practices — Managed Services Dominate
Enterprises can choose their TEM consumption model from several options, ranging from basic DIY SaaS bundles/services to fully managed TEM with additional business process outsourcing (BPO) engagements as required. The commercial model includes options for bundled capabilities or an à la carte service.

While the vast majority of TEM engagements now are for a managed solution, some enterprises still want to control the processes internally with the use of a self-managed platform, possibly with some add-on services, such as for bill payment. However, Gartner continues to hear clients sharing frustrations of invoice loading and particularly inventory proven to be challenging, resulting in enterprises shifting to fully managed services to ease internal burdens.
While the traditional TEM offer covered fixed and mobile communication services, the portfolios and service offerings have evolved, both in terms of more features such as life cycle management, managed mobile services (MMS) integration, and to cover more services, such as IoT, unified communications (UC) and other IT asset modules. SaaS license tracking and optimization are also becoming more common as risks and concerns about SaaS and IaaS growth require greater control and tracking in enterprises.

While these evolving portfolios are representing a trend, Gartner inquiries and RFP-related requests are still largely on the traditional fixed and mobile estates. There is a tendency to include more managed mobile services. AP and HR integrations are typically done via big ERP platforms (such as SAP), but where necessary, vendors can offer more customizable AP/HR integrations. Client inquiries also have increased for network transformation requirements with front-end consultancy along with TEM. Enterprises are showing greater interest in project management assistance associated with life cycle processes and optimizations for services such as SD-WAN.

Factors Influencing TEM Vendor Selection

Several factors influence TEM vendor selection. These are some of the more prevalent ones:

- **Price/contracts** — Pricing is typically set by tiers as a percentage of overall annual spend or price per device per month. Competitive bidding situations have brought pricing down, especially in more significantly-sized deals.

- **Savings guarantees** — These are being requested occasionally from new TEM clients (that have not had TEM engagements in the past), but less so than for end-user enterprises that are in their second or third TEM engagement. In new TEM engagements, clauses in the contract have been negotiated to guarantee that the minimum amount of savings should equal the cost of the service. These contracts include exit conditions if those savings are not achieved each year, ensuring that the difference does not go back to the client. Not all vendors support this requirement.

- **Operational quality, including account management, outcomes, SLAs and delivery capabilities** — More RFPs include requirements to meet defined SLAs. SLAs are an important part of TEM engagements, especially to support improvement over time. Gartner’s Toolkit: Telecom Expense Management RFP Template includes SLA suggestions that are commonly addressed in RFPs. The quality of the RFP response and flexibility in negotiation are important, and the contract should include performance-related exits if SLAs aren’t met.

- **Relevant scalability** — This is necessary for both technical and geographic requirements. It is important to rightsize and obtain the services required (and any additional services that may be put under management within the contract duration).

- **Prior experience** — Whether it has been positive or not, prior experience is considered during vendor selection. This should include experience not only in a particular country, but also with particular carriers and partners in that country to meet geographic and technical requirements.
During 2019 and 2020, buying cycles for TEM have continued to be long, especially for larger deals, which often take from nine to 12 months. Part of this has been associated with regulatory compliance requirements, especially in international deals, but the COVID-19 pandemic also contributed to longer than usual decision-making times and implementation times.

To avoid being forced into month-by-month contracts (or even longer-term autorenewals), possibly worsening terms with existing vendors, enterprises should start the buying process earlier in the contract life cycles and keep up-to-date on the competitive landscape. The average contract term remains about 36 months, with a 12-month break/renegotiation clause. Some vendors provide month-by-month contracts, but this is atypical in the market.

Occasionally, some clients demand a try-and-buy model. This includes an initial audit in a contingency fee model covering a portion of the initial scope, and then will move to a three-year standard TEM contract when clients are satisfied with the outcome.

**Representative Vendors**

**Market Introduction**

The vendors reviewed here include those most frequently asked about in Gartner end-user inquiries, typically serving the large, regional or MNC enterprise base.

Gartner has separated TEM vendors into those that can provide coverage globally, that is, in three regions or more (see Table 1), and those that are more regional (see Table 2). Attributes of TEM providers profiled are shown in Note 1. Note 4 provides some additional examples of TEM providers.

In addition to the TEM providers included in this report, system integrators (SIs), outsourcers and business management firms provide TEM services. These providers typically partner with TEM...
vendors to provide deeper-dive consulting and integration capabilities on extremely complex deals or white-label TEM platforms as part of larger system integration deals.

Also, communications service providers (CSPs) such as BT, Orange, Vodafone, AT&T and Telefónica are active through partnering and white labeling, typically providing the ongoing ordering function. MMS providers are also active in this market.

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Product, Service or Solution Name</th>
<th>Main Geographic Coverage</th>
<th>Total Spend and/or Devices Under Management</th>
<th>Typical Enterprise Size or Telecom Spend/Device Count Under Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asignet</td>
<td>Wayfast</td>
<td>Global</td>
<td>$5.5 billion Over 295,000 mobile devices</td>
<td>Midsize to large MNCs From $4 million to $500 million in annual spend, and/or from 2,000 to 100,000 devices</td>
</tr>
<tr>
<td>Calero-MDSL</td>
<td>Calero-MDSL</td>
<td>Global</td>
<td>$22 billion Over 3 million devices</td>
<td>North America and EMEA Midsize and large, regional and MNC enterprises From $5 million to more than $500 million in annual spend, or 1,000 to hundreds of thousands of devices</td>
</tr>
<tr>
<td>Cass Information Systems</td>
<td>ExpenseSmart</td>
<td>Global</td>
<td>$63 billion 2.7 million devices</td>
<td>Large enterprises and MNCs Annual spend from $5 million to $200 million, or more than 1,000 devices</td>
</tr>
<tr>
<td>Vendor</td>
<td>Product, Service or Solution Name</td>
<td>Main Geographic Coverage</td>
<td>Total Spend and/or Devices Under Management</td>
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</tr>
<tr>
<td>NTT</td>
<td>Communications Lifecycle Management</td>
<td>Global</td>
<td>Over $4.2 billion 1.2 million devices</td>
<td>Large regional and multinational enterprises From $10 million in annual spend to hundreds of millions</td>
</tr>
<tr>
<td>Sakon</td>
<td>Telecom Expense Management (TEM), Sakon Mobile</td>
<td>Globally in 75 countries</td>
<td>Over $7 billion 1.3 million devices</td>
<td>Large national and multinational enterprises From $10 million to $500 million in telecom spend From 5,000 to 400,000 devices</td>
</tr>
<tr>
<td>Tangoe</td>
<td>Tangoe Application Mobile Application Cloud Application</td>
<td>Global</td>
<td>$14.3 billion 9.1 million devices</td>
<td>Large North American and EU regional companies and MNCs Annual spend from $1 million to over $750 million; also from 1,000 devices</td>
</tr>
</tbody>
</table>

APAC = Asia/Pacific; BYOD = bring your own device

Source: Gartner (October 2020)

Table 2: Representative TEM Pure-Play Vendors for Regional Delivery
<table>
<thead>
<tr>
<th>Vendor</th>
<th>Product, Service or Solution Name</th>
<th>Main Geographic Coverage</th>
<th>Total Spend and/or Devices Under Management</th>
<th>Typical Enterprise Size or Telecom Spend/Device Count Under Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avail</td>
<td>Connected Operations Management Process via platforms 4A and Mobility Central</td>
<td>North America</td>
<td>$325 million 80,000 devices</td>
<td>Large, regional MNCs Annual managed spend of $3 million or more 1,000+ employees</td>
</tr>
<tr>
<td>Bruin</td>
<td>Bruin</td>
<td>North America</td>
<td>$1.5 billion 8.9 million devices</td>
<td>Midsize to large North American enterprises, government agencies and U.S.-based MNCs, expanding internationally Annual spend from $250,000 up to hundreds of million 300+ devices per month</td>
</tr>
<tr>
<td>Globys</td>
<td>Globys TEM platform</td>
<td>Europe and North America</td>
<td>$242 million 370,000 devices</td>
<td>Large national, European and North American regional enterprises and MNCs Up to $60 million under management</td>
</tr>
<tr>
<td><strong>Habble</strong></td>
<td>Habble TEM</td>
<td>Europe, Italy, Spain, Iberia</td>
<td>$150 million 2 million devices</td>
<td>Large regional enterprises and Europe-based multinationals and carriers 200+ customers 1.3 million SIMs, 600,000 landlines and 2 million TEM lines under management</td>
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</tr>
<tr>
<td><strong>ICOMM</strong></td>
<td>ICOMM managed TEM Service, Telecom Management Application (TMA)</td>
<td>North America</td>
<td>$300 million 484,000 devices</td>
<td>North American large and MNC enterprises Annual spend from $10 million to $30 million to $250 million Or 500 to over 50,000 devices</td>
</tr>
<tr>
<td><strong>MobiChord</strong></td>
<td>MobiChord</td>
<td>North America and Europe</td>
<td>$603 million 740,000 mobile devices</td>
<td>Medium and large U.S.- and Europe-based companies Annual spend above $5 million Or at least 5,000 devices</td>
</tr>
<tr>
<td><strong>Network Control</strong></td>
<td>TemNet</td>
<td>North America</td>
<td>$385 million 236,000 devices</td>
<td>Large North American enterprises Annual spend from $2 million to $50 million Or 1,000 devices</td>
</tr>
<tr>
<td><strong>One Source</strong></td>
<td>One Source</td>
<td>North America</td>
<td>Over $1 billion More than 2.5 million assets and devices</td>
<td>Medium and large North American enterprises Annual spend from $100,000 to $50 million From 500 to 100,000 devices</td>
</tr>
<tr>
<td>Company</td>
<td>Solution</td>
<td>Region</td>
<td>Revenue Range</td>
<td>Devices Range</td>
</tr>
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<td>----------------------</td>
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</tr>
<tr>
<td>RadiusPoint</td>
<td>ExpenseLogic</td>
<td>North America, Europe (U.K., Spain, France and Germany)</td>
<td>$623 million More than 63,000 devices</td>
<td>Medium to large regional and North America-based MNCs with small European subsidiaries in the U.K., France, Spain or Germany</td>
</tr>
<tr>
<td>Tellennium</td>
<td>Tellennium Integrated Management System (TIMS)</td>
<td>North America (U.S.)</td>
<td>$225 million 22,000 devices</td>
<td>Medium and large U.S.-based companies Annual spend of $600,000 to $40 million 500 to 10,000 mob devices</td>
</tr>
<tr>
<td>Upland (Cimpl)</td>
<td>Cimpl, ComSci, CCO</td>
<td>North America</td>
<td>$2.7 billion 9.2 million devices</td>
<td>Medium to large North American an regional companies From approximate $1.5 million to over $75 million</td>
</tr>
<tr>
<td>Valicom</td>
<td>Clearview</td>
<td>North America</td>
<td>$500 million 200,000 devices</td>
<td>Medium and large U.S.-based companies Annual spend of $500,000 to more than $70 million Minimum of 500 mobile devices</td>
</tr>
<tr>
<td>Vision</td>
<td>Wireless Tracker</td>
<td>U.S.-centric, but managing spend globally</td>
<td>$450 million 740,000 devices</td>
<td>Medium and large North America-centric, but managing spend globally</td>
</tr>
<tr>
<td>WidePoint</td>
<td>Intelligent Telecommunications Management System (ITMS)</td>
<td>North America</td>
<td>$780 million 900,000 devices</td>
<td>Medium and large North America-based organization primary focus on public sector and highly regulated commercial sector</td>
</tr>
</tbody>
</table>
The vendors listed in this Market Guide do not imply an exhaustive list. This section is intended to provide more understanding of the market and its offerings.

**Vendor Profiles**

**Global Vendors**

**Asignet**

Parsippany, New Jersey-based Asignet is a managed service TEM, MMS, ITAM and ITSM provider with offices in Latin America and Spain. In February 2020, Asignet completed a round of Series A funding by Abry Partners. Asignet has 50 customers and more than 100 employees. Asignet provides TEM/MMS/ITAM solutions addressing IT, fixed voice, data, mobile, IoT, SaaS licenses and cloud services (for Amazon Web Services [AWS] and Microsoft Azure, Skype and Microsoft 365) using patented RPA technology through its proprietary Wayfast cloud platform as a service (PaaS).

Asignet’s RPA automated solution has 11 global patents. Core automated functions are invoice processing, inventory discovery, contract management and orchestration for provisioning. Asignet has integrated more than 1,000 SaaS/telecom portals into Wayfast. Asignet maps all data using RPA integration for inventory and change management accuracy. Microsoft’s Power BI is fully integrated into Wayfast. During the last year, Asignet has improved its procure-to-pay systems.

Asignet offers its solution as a fully managed service or as a host-and-load service. RPA operations and data management are supported by its operational centers in Uruguay and Mexico. Asignet provides invoice processing, contract management, asset management, order management, usage management, audit and dispute management, allocations and chargebacks, full contract management, enterprise integration, UCaaS integration, 24/7 help desk, security, and analytics. Asignet’s Wayfast platform fully integrates with all the major ITSM and ERP systems.

**Calero-MDSL**

Calero Software and MDSL, two high-growth software providers in the recurring TEM space, merged to form Calero-MDSL in late December 2019. Calero-MDSL provides Technology Expense Management (TEM), Market Data Management (MDM) and Managed Mobility Services (MMS) software and services to help enterprises manage their mission-critical and highly complex recurring expenses across fixed-line and mobile telecommunications, market data subscriptions, IoT, SaaS and cloud infrastructure operations. The newly formed entity serves more than 3,350 customers, and has over 800 employees and 10 offices in Europe, North America and Asia/Pacific.

Calero-MDSL’s TEM feature set focuses on managed mobility, fixed voice and data, call accounting, UCC, subscription-based services, cloud, IT asset management, and IoT. The company
performs audit, optimization and savings management activities for these services on a global scale. The company has a defined shared services platform strategy, integrating their TEM capabilities and delivering innovations across their customer base. The main priorities of this strategy are invoice intake and normalization, the mobile portal, API provisioning/e-bonding hub, e-bill processing, reporting and analytics unification, and user interface harmonization.

New functionality added this year includes a geographic inventory mapping solution that allows clients to see which offices, custom regions, states or metropolitan areas are driving costs. It also includes the ability to see wireline routes mapped to ensure new service quotes meet customers’ needs for business continuity and risk mitigation.

**Cass Information Systems**

Cass Information Systems (Cass), founded in 1906, offers fully managed global TEM services with its hosted platform, ExpenseSmart. It provides a broad range of expense management services for fixed and mobile (incorporating wider MMS and BYOD services), BYO network, IT and cloud. It offers standard integrations with third-party systems, including single sign-on, ITSM, human resources information systems (HRIS), AP/GL and UEM. Clients can access Cass by API to combine Power BI and Tableau reporting. ExpenseSmart’s IaaS and PaaS cloud solutions manage security, compliance, chargeback, budgeting and cost optimization for AWS, Azure and Google Cloud Platform (GCP).

Cass has an IoT/M2M solution extension for its mobile offering, focused on IoT inventory, provisioning, invoice processing, auditing and disputes. Through its subsidiary, Cass Commercial Bank, Cass provides global invoice payment services. Cass uses RPA for electronic invoice collection, paper invoice collection and other data extraction. It leverages machine learning for visibility into unstructured data formats for data quality and audit accuracy.

Cass offers services in most regions directly or via partners. It has partnerships with system integrators CompuCom, HCL Technologies and Acuative. With over 1,200 employees globally, Cass manages $63 billion of annual spend and processes over 245,000 invoices daily in over 90 countries. Cass is GDPR-compliant and Privacy Shield-certified.

**NTT**

NTT, based in Tokyo, Japan, offers telecom (fixed, mobile, cloud, IoT) capabilities based on one global platform. This platform resides in the NTT data centers, hosted on the NTT cloud, secured via NTT Security, and developed on its own IP. This single platform supports the management of voice and data services, delivered over fixed, mobile and IoT assets. It also supports the management of conferencing, cloud and utility services. This single global platform supports quote to order, source to procure, inventory management, accounts payable, financial payments, governance, change and life cycle management. This single platform also provides descriptive, predictive and prescriptive analytics for different stakeholders to make evidence-based decisions and achieve business objectives.
Recent enhancements include AI-based analytics (descriptive, predictive and prescriptive), real-time conferencing analytics (for Cisco Webex, Microsoft Teams, and Zoom) and mobile workplace connect solutions (also offering a secure global e-sim solution, includes platform integration, via a joint go-to-market with NTT Transatel). NTT now has an integration with SAP Concur for proactive roaming management, and with Cradlepoint to receive IoT asset information.

Sakon

Sakon is a global provider of enterprise expense management services, with fully managed TEM currently its predominant service. The vendor, based in Concord, Massachusetts, has 650 employees and a delivery center in Pune, India. It offers a SaaS-based expense management and mobile operations platform, which form the basis of both its fully managed and self-service TEM services. Sakon has a strong implementation team and managed services to support more than 220 enterprises globally, both directly and indirectly through partners. Although the Sakon TEM platform is utilized by several vendors in Gartner's Magic Quadrant for Managed Mobility Services, Global, about 60% of the company’s $7 billion of telecom spend under management is for its own fully managed TEM services.

Sakon’s platform integrates with more than 1,000 service providers globally, with an open architecture enabling third-party integrations for wireline, mobile, cloud, and ITSM, GL, AP and HR solutions. Sakon’s TEM consists of procurement, provisioning, inventory, expense management and bill payment modules, managing global communications inventory (wireline, network, wireless, IoT, SaaS), usage and cost optimization, sourcing, and supporting network transformation. Features include complete real-time inventory, with all required vendor, location and service details and automation of monthly invoice validation, as well as vendor quote management to drive supplier price competition. Sakon also offers reporting and interactive dashboards to enable efficiency insights and reveal trends, abnormalities, SLA compliance and traffic-support metrics.

North America accounts for about 83% of Sakon’s telecom spend under management and about 58.6% of total devices under management. EMEA is its next largest region, accounting for 11% of managed spend and 23.7% of managed devices.

Tangoe

Tangoe is owned by Marlin Equity Partners and is based in Parsippany, New Jersey. Tangoe serves more than 1,500 enterprises globally with its TEM solutions, advisory services, and managed pay services and solutions. Tangoe also provides MMS program management for mobile, and expert expense management with advanced usage and optimization for cloud. Tangoe’s presence expands across all regions through 13 offices and has around 1,950 employees. Tangoe has agreements and integration with more than 200 carriers in North America, EMEA, Latin America and Asia/Pacific.

Tangoe is continuing its TEM platform strategy by bringing its best-of-breed solutions into the main product with modules that allow customers to leverage the configurations needed to provide business value while also supporting a service team. Tangoe One is a combination of telecom for
fixed applications, mobile for managed mobility services, and cloud for cloud expense and optimization management.

In addition, for customers that need a more configurable or customizable experience, a module based on Rivermine provides the functionality needed. Tangoe's automation framework includes advanced workflow, orchestration, an API framework, RPA and AI/ML. Tangoe's solutions are delivered as a license only, SaaS solution or a fully managed BPO solution. Tangoe One improvements since 2019 include modernized UI, reporting, automation, telecom, mobile and cloud service expense management, and the ability to track IaaS daily usage and optimization.

Regional Vendors

Avail

Iowa-based Avail provides consultative and business-process-led telecom and technology management services to large U.S. enterprises and North America-based regional MNCs. Avail’s service is called Connected Operations Management, and uses its cloud-based TEM platforms 4A and Mobility Central at its core.

Avail’s financial and technology optimization solutions cover wireline, wireless, IoT, cloud, fleet management, hardware and software. It is also bringing data warehousing capabilities into its platform for geographic and site-level inventory views on private network assets, hardware, site port utilization and configuration information to help drive enterprise decision-making processes for the supported technologies.

Avail integrates with all leading ITSMs and an expanding number of carriers in North America, EMEA, APAC and Latin America via API, EDI or other methods. Avail uses IPsec or manual security processes. Avail ensures the billing data captured is aligned to the carriers’, and ties to the SLAs for full assessment on ROI guarantees with real-time data consumption visibility.

Avail has 31 employees; its approach provides full consulting-led end-to-end technology management, executing via a simple onboarding process and ongoing customer engagement. Avail’s process involves fully documenting and understanding the client’s operational environment, direction and financial risk, along with benchmarking, SLA compliance and explicit site-by-site detail, audit and optimization services.

Avail goes to market directly and indirectly through independent distributors, and is expanding its partner channels.

Bruin

Bruin offers midsize and large, complex North America-based enterprises and government agencies fully managed services for financial control; and operations for telecom services, including service optimization (wireline, wireless, IoT and IaaS) over the Bruin platform, also branded as “MetTel Portal.” Headquartered in New York City, Bruin now has sales presence globally.
There are more than 1,500 customers on the Bruin platform, of which 100 are MNCs. Bruin has over 75 employees.

Bruins’ capabilities include account management, invoice auditing, contract management, true inventory, vendor gateway (for enabling customers to access all their vendors at once, place orders for new services or make changes to existing ones using customizable workflows and lines of approvals) and business intelligence reporting.

Recent enhancements include a homegrown RPA engine; Bruin’s Honey AI and Parser to further enhance automation on invoice data gathering and processing; and Intelligent Actions for cloud implementations. Bruin uses “Genie Boards” to allow customers to post the most critical data onto their Bruin dashboard, and Bruin will then customize any report to feed their systems. The Bruin technology and expense management platform can also deploy mobility management and utility expense management modules.

Globys

Headquartered in Seattle, Washington, Globys has 500,000 business customers and provides TEM directly and indirectly via partners — typically CSPs and ITOs. Globys’ TEM service is heavily geared toward wireless, which represents 90% of expenses under management, with the remaining related to wireline expenses and, as of 2020, cloud-related expenses. Globys TEM Platform is an integrated SaaS platform with buying, invoice management and analytics functionalities.

Globys emphasizes data privacy and protection, with ISO 27001 certification and GDPR compliance in the whole TEM platform. Globys supplements its carrier bill presentation, self-service procurement, support and wireless expense management capabilities with a range of modular fixed expense management, BPO services, analytics, payment services, consulting, professional and integration services.

In addition to Europe and North America, Globys has presence in the Middle East and Australia/New Zealand, applying follow-the-sun support capabilities. Globys’ platform provides a variety of reports and has real-time tracking solutions for mobile voice and data usage. Data is organized by currency, country and business unit.

Globys’ user interface is part of its expense management suite, providing enterprises and managed service providers with a global view of transactional spend, usage, service and SLA management, with a simultaneous dashboard presentation. It allows local service escalations and spend forecasting templates for international rollout.

Globys also provides a global invoice normalization service for customers to load international spend data in other platforms. Globys has focused further on workflow automation and integration to decrease the number of errors and lower operational costs in buying and management processes for customers.

Habble
Italy-based Habble was founded in 2012 from a telecom consulting spinoff. Habble’s cloud-based platform provides the management, automation, reporting, visibility and control of corporate telecom assets, including mobile, IoT endpoints and communications services, and fixed networks. Habble serves enterprise customers across all verticals directly and through a framework agreement with TIM Group (Telecom Italia Mobile) and WINDTRE. While most Habble’s services are self-managed via its platform or on a mobile app, it also offers fully managed services.

Habble’s solution is modular in design. Services include invoice and contract management of wireline and wireless (including real-time monitoring and advanced reporting) via an analytical dashboard. The platform and dashboard allow for alerting, prevention and insights for data, voice, SMS, automatic cost allocation by business user/line policy enforcement, and data usage management based on location or application.

Habble is constantly evolving its platform based on end-user and enterprise needs. It has implemented monitoring solutions in partnership with Sandvine and Samsung.

Habble white-labels a carrier solution (currently in Italy and Iberia) to give carriers information from their billing systems synced with usage trends and costs. Habble also provides a dashboard for the carrier’s customers. This enables proactive customer care, dispute and refund management and allows for more targeted sales to end customers.

Habble has 30 full-time employees/collaborators and has fully integrated four leading carriers.

**ICOMM**

ICOMM is a telecom management and consulting company based in Forest Park, Illinois, with 75 employees. ICOMM Managed TEM Service and ICOMM Telecom Management Service represent a fully outsourced and turnkey model of TEM including dispute management capabilities.

ICOMM’s TEM Services include detailed reporting, service inventory reports, interaction reports covering move, add, change or delete (MACD) activities and repair activities, equipment reports (including telephony, WAN, mobile and IT devices), and a monthly scorecard report with SLAs.

ICOMM’s TEM offering is inventory-centric and includes a modular application called Telecom Management Application (TMA), which is either hosted or cloud-based. TMA includes a service module with a detailed inventory with all communications-related services. It provides a site module for detailed telephony and networking inventory, an invoice validation processing module customized to a client’s accounting system, and an interaction module for ordering and incident management. Real-time status and related reporting are available for all the modules.

ICOMM applies automation specifically in invoicing and inventory and order reconciliation. Recent enhancements include automation of the inventory and invoice reconciliation process and its new Reportal, offering display of invoice and inventory data, and a full suite of reports.

**MobiChord**
Gartner, Inc. | 723580

Based in Salt Lake City, Utah, MobiChord provides a full SaaS-based portfolio of self-service TEM capabilities and comprehensive BPO solution for wireline, mobile, cloud and IoT environments on the ServiceNow platform. The company serves customers in all regions, with 86% of its telecom spend under management in North America and the EMEA region. In the past year, fixed-network TEM accounted for 51% of spend under management and mobile accounted for 31%. MobiChord has more than 140 full-time employees. In 2019, the vendor increased its global devices under management by 45%, and telecom spend under management by 68%.

MobiChord is a ServiceNow Elite Partner and has the “Built on Now” designation for native apps. MobiChord enables customers — whether or not ServiceNow customers — to use the platform’s already-integrated business data and technical capabilities such as TEM process automation and configurable workflows, and self-service.

MobiChord’s SaaS covers all endpoints, network assets, expenses and services. MobiChord integrates with over 300 carriers globally — including 230 in North America and EMEA — with all carriers, cloud providers and managed service provider partners unified into the ServiceNow platform. MobiChord provides insights into assets, spend, consumption and services for end users and managers, with global dashboards and oversights for administrators.

Optimization can be fully automated, with customer-approved service changes implemented automatically by MobiChord’s software. MobiChord recently expanded its offering to include its Bill Pay solution, where rebates pass through to the customer.

**Network Control**

Founded in 1998 and based in Iowa, Network Control provides a proactive full life cycle managed TEM service for over 85 enterprises across most verticals via an on-premises or cloud-based platform called TemNet.

The company is expanding its global coverage from its six North American operating facilities into Europe, Latin, APAC and the Middle East, and uses local partners when needed. Network Control’s TEM solution covers fixed, mobile, cloud, IoT and other IT assets, and it can provide short-term contracts.

Network Control’s TEM software functions focus on inventory and contract management, procurement, order provisioning, invoice validation, audit processing, technical support, RFP, strategic planning, allocation and chargeback. With daily reviews for anomalies, Network Control delivers reporting and in-depth monthly recommendations to optimize services and costs.

Network Control’s services extend into other billable items such as UC and cloud licenses. For mobile, it offers wireless 24/7 help desk support, optimization and device kitting.

Network Control has seamless API integration into business processes (GL, HR, AP finance and unique customer needs) and has over 300 carrier integrations. The company uses AI technology with automated readers for invoice detailing, exception and anomaly identification. RPA is used to
pull carrier billing data, analysis, for invoice approval, workflow, contract alerts, notification processes, wireless employee and manager reports.

With 80 professional resources, Network Control has a high-touch, dedicated support team and a high employee-to-customer ratio, which results in 98.5% customer retention.

**One Source**

Based in Greenville, North Carolina, privately owned One Source offers fully managed communications life cycle management (CLM) and managed mobility services (MMS) as part of an integrated solution that also includes managed IT services and managed security services.

With an average customer tenure of 12 years, One Source serves a base of more than 1,300 customers and more than 30,000 locations globally. It has 300 U.S.-based employees.

The company offers ongoing contract management, MACD support, sourcing, provisioning and 24/7 help desk support through its six U.S.-based, geographically redundant offices. It also offers cost recovery and dispute management with dedicated resources that manage processes and provide recommendations for ongoing optimizations and enhancements.

Service performance is driven through a cloud-based TEM application for analytics, contract/service/inventory management, ticketing, ordering and life cycle management activities. The portal provides all the benefits of a SaaS solution, with the scalability of outsourcing.

The company’s offering includes mobile and IoT kitting, as well as depot operations in the U.S.

It includes integrated managed security services for security-conscious enterprises with large mobile workforces and enhanced security and privacy (e.g., HIPAA, PCI, SOC 2, U.S.-based/no outsourcing/offshoring) for enterprise customers with heightened security posture.

**RadiusPoint**

Privately owned RadiusPoint, based in Casselberry, Florida, offers fully managed wired and mobile telecom expense management through its ExpenseLogic software solution. ExpenseLogic also is available as SaaS, although RadiusPoint indicates that all of the telecom spend under its management is for the fully managed solution. The company currently serves customers in the U.S. and EMEA, with 90% of the spend under its management in North America. It has 43 full-time employees and in 2019 increased its devices under management by 40% to 63,000. Managed spend grew 13% to $623 million. Fixed-network TEM accounted for 40% of spend under management, with mobile and utility/lease accounting for about 30% apiece.

Expense management services cover fixed networking, including SD-WAN and VoIP, mobile, SaaS application license tracking, billing, invoice processing, and audit. RadiusPoint also performs optimization by location and ID level for IT, communications, software applications and devices, along with utility services such as power and leases for equipment or facilities. The platform pools
weekly reports that highlight credits and refunds, and it provides quarterly reporting containing verified savings and credits.

RadiusPoint uses its own help desk for fixed and mobile order fulfillment, Tier 1 and 2 support, kitting, and testing. It uses partners for mobile device break/fix, recycling and after-hours support. The vendor also offers an e-procurement portal called BNDL with partner Dexter GBS, providing group purchasing discounts for all business services and supplies, including office supplies, software licenses, hardware such as PCs, and services such as janitorial, energy and water.

Tellennium

Tellennium, based in Louisville, Kentucky, provides fully managed TEM for wired, wireless, cloud, utility and IoT assets and services, based on Tellennium's Integrated Management Solution (TIMS) platform. A SaaS-based version of TIMS is available for self-managed TEM, although fully managed TIMS deployment accounts for an estimated 97% of the telecom spend under the vendor's management. Fixed network accounted for 79% of spend under management in 2019, with mobile accounting for 11%.

TIMS provides real-time data to support expense management services such as payment, invoice processing, inventory management (based on the circuit's actual address with details, rather than just the billing address), IoT management, audit, optimization, support and change management services. Automated processes include invoice and discrepancy queues, payments, inventory management and MACD workflow. Tellennium relies on human engagement from its full-time workforce of 42 for customer relationship management, data verifications and issue resolution.

Tellennium focuses on customers in North America, which accounted for more than 99% of its telecom spend under management in 2019. More than 35% of the vendor's customer base is in healthcare, although Tellennium's base includes businesses in energy, legal, financial, real estate and technology verticals. The company sells both directly and through an indirect channel of value-added resellers that, if required, provide account management support.

Upland (Cimpl)

In 2019, Cimpl joined Upland Software, headquartered in Austin, Texas, to augment Upland's Telecom Expense Management (TEM) and IT Financial Management (ITFM) solution suite Offering. Cimpl's TEM solution, coupled with Upland's existing ComSci ITFM Capabilities, provides customers with IT cost optimization and management capabilities spanning the entire IT, communications, telecom, cloud, pProject and shared services landscape.

Cimpl focuses on the automation of manual processes by providing data integration points with CSP; connections to client HR systems of record, CMDB's, financial and ERP systems. It also delivers order provisioning capabilities with ITSM and third-party vendors. Cimpl offers configurable reporting, KPIs and dashboarding abilities, and provides insights into a customer's IT, telecom and communication environments.
The solution supports a configurable business processing rule engine that drives data accuracy and ensures appropriate tagging, tracking, exception and validation handling, which reduces cycle times. Recent system enhancements include an expanded payment readiness tool (payment follow-ups), discrepancy tracker capabilities, enhanced contract management (centralized repository), self-service access for end users on Upland mobile application, and Cimpl University for self-paced, online learning.

Delivered via SaaS through managed service or do-it-yourself, the solution focuses on outcomes across all major core competencies, including fixed voice, mobile, call accounting, IT asset management, SaaS, IoT and cloud license management. Cimpl provides full implementation support for its product, and partners with service integrators (SIs), consulting firms and carriers.

Valicom

Valicom, based in Madison, Wisconsin, provides a full set of expense management capabilities, including sourcing management, ordering and provisioning management, inventory management, invoice and contract management, usage management, dispute management, auditing, and reporting. Valicom also provides cloud server asset reporting and tailored reporting at no charge throughout the engagement. Valicom is a 100% woman-owned, vendor-independent company that also provides IoT TEM, other IT asset management and utility expense management services.

The Valicom platform, called Clearview, is a web-based telecom expense, invoice and inventory management software. Valicom goes to market both directly and indirectly via its channel partner program. Clearview can be accessed through several models: Host & Load (a subscription with a monthly recurring charge), as a one-off telecom audit outsourcing project, as a hybrid with access to the platform plus professional services, or as fully outsourced BPO. Electronic imports are utilized to collect vendor/carrier invoices, using a proprietary database to organize, analyze and report inventory.

In the past year, Valicom refreshed the interface of its software as well as its complementary bill payment services, processing gas cards and utilities invoices for additional benefits to AP.

Vision

Based in Augusta, Georgia, Vision offers fully managed TEM for mobile expenses through an in-house developed solution. It reports on ordering status, mobile asset management, MACDs, help desk ticketing, cost allocation and depot tracking, and TEM analysis, expense and usage optimization. It also provides electronic invoice loading and normalization of billing data and offers user self-service mobile support. Vision has 100 full-time equivalents (FTEs).

Vision integrates with ITSMs, including ServiceNow and Remedy; AP systems such as JD Edwards, Lawson and SAP; and procurement systems such as SAP Ariba and Coupa.

Recent additions to Vision’s capabilities include reverse logistics system automation that is triggered on key device orphan events such as upgrade, line cancellations or employee termination.
Vision has also automated a process to recalculate carrier billing within its system to better align with corporate telecom needs. For example, it can help decrease data consumption by charging artificial overages, or flat the MRC by device type to create predictable budget-based billing for cost center managers.

WidePoint

Based in Fairfax, Virginia, WidePoint has more than 235 employees, and its platform, Intelligent Telecommunications Management System (ITMS), manages wireless and wired telecom expenses, with cloud expenses slated for 4Q20. WidePoint also offers MMS. ITMS is composed of five building blocks — business intelligence, enhanced security, policy enforcement, help desk and scalable customization. Collectively, the offer includes reporting, analytics, and oversight of sourcing procurement and vendors; ordering; provisioning; contract analysis and compliance; invoice; and dispute management. Delivery options from WidePoint include both managed services and SaaS models. U.S.-centric WidePoint supports clients with international locations and has processed invoices for more than 80 international carriers. Also, ITMS supports robust currency conversion.

WidePoint’s automation features include HR file ingestions, user creation and automated device ordering for new employees; ticketing system ingestions (e.g., ServiceNow, Remedy); and automated device ordering. There are also automated audit algorithms to scrub for known SOC, rate plan, and feature codes against policy or contract; automated threshold variance for audit report generation and MACD workflow automated emails or notices; and one-click approvals.

WidePoint has a strong focus on security, and the platform fulfills security requirements mandated by the U.S. federal government. It also has a dedicated security team.

Recent introductions include features for both wireline and wireless that automatically identify appropriate carriers for a desired coverage area (wireless) or service address (wireline). These capabilities help clients save time and prevent ordering errors.

Market Recommendations

Sourcing, procurement and vendor management leaders should:

- Select TEM vendors based on the vendors’ ability to meet technical and functional requirements, competitive pricing and strong operational quality, which includes consistent performance against SLAs, strong processes and customer-centric responsibilities by the resources aligned to the account. Be definite about your objectives and against what benchmark you will assess vendor performance.

- Examine the local capabilities of the vendor, either directly or through partnerships. Initially assess capabilities in the most important countries to be deployed. Require TEM vendors to acknowledge if they need to partner, and identify those partners for the level of their involvement. Ask vendors to confirm that service delivery, quality assurance and governance
models are implemented for fully managed TEM, thereby ensuring that partners and vendors meet local fulfillment needs and service levels.

- Review platform and automation capabilities for services beyond traditional fixed and mobile to meet requirements for reporting and inventory management detail. Ensure that scaled automation is not done at the expense of service delivery. In doing so, quiz the vendor on assurance metrics for error testing and correction. Ensure that SLA metrics around service delivery are satisfactory and include improvement over time.

- Minimize deployment challenges by clearly understanding what can be provided and where, by knowing the roles and responsibilities (internally and in the vendor organization) in the governance model included in the contract. Define implementation schedules for different services (as required) and for different regions. Use SLAs with targeted metrics. This will assist in understanding vendors’ ability to drive efficiencies at scale and in complex landscapes.

- If you are changing your TEM vendor, ensure that a vendor migration path is in place, and that you understand privacy or security requirements by geography to prevent delays in new vendor migration. Enterprises will be forced into month-by-month contracts until all considerations have been sorted out.

- Perform due diligence on TEM vendors involved in M&A activity around their ability to maintain day-to-day activities, service delivery, future platform roadmaps, financial position and leadership. Enterprises should contractually protect themselves in the event of M&A activity.

Evidence

Gartner had a large number of TEM-related inquiries from end users focused on sourcing from vendors. Of the TEM-related inquiries from August 2019 through August 2020, approximately 67% were from end-user organizations. On several occasions, enterprises noted that using one company to perform central management of most of their IT assets would be useful.

Note 1
Representative Vendor Selection

Vendors included within this research are those that:

- Offer SaaS-based TEM offerings

- Foundationally offer both fixed and mobile TEM (not one or the other) and are expanding their offerings to include other technology areas such as cloud services, IoT TEM, other IT asset management and software tracking

- Are carrier-agnostic
Go to market directly, offering their services as a fully managed and self-managed solution, and have their own platform (rather than using a platform or another TEM vendor).

Mobile-only TEM vendors or pure-play MMS providers are not included here, but are found in other research areas, such as Magic Quadrant for Managed Mobility Services, Global and Critical Capabilities for Managed Mobility Services, Global. Also, information on these companies can be provided via inquiry.

System integrators, IT outsourcers, consultants and communications providers offering TEM services are also not included in this research; yet, they offer TEM services using the platforms of pure-play TEM vendors. Examples of additional smaller U.S. players, ITOs or mobile-only TEMs (that are discussed on occasion) are included in Note 4.

Note 2
TEM Stack Definitions

Definitions of the TEM stack:

- **Sourcing, procurement and vendor management** refers to TEM vendors that negotiate prices, terms and conditions for telecom and network service contracts on behalf of customers.

- **Ordering and provisioning management** supports the commissioning and deployment of telecom/network services and mobile assets, tablets and devices based on predefined rates and support for user profiles, drawing on service catalogs, structured workflows and authorizations. Process services for ordering and provisioning include help desk services for order placement and logistics support relating to deployments, replacements and break/fix depot repairs. Also included are help desk services for cases where self-service portals cannot address end-user needs.

- **Inventory management** applies to processes and services that provide one or all of the following: wireline (voice and data) and mobile services; connected IoT services; cloud consumption-based services; mobile devices, tablets and IoT devices; and related infrastructure. Asset discovery, asset management, asset database/repository and asset portfolio management are also included. Inventory management also applies to the tracking of purchases, leases, contracts and disposal relating to telecom assets, cloud licenses, IoT, and other related assets and expenses. Links to general ledger accounting system modules (such as the capital asset ledger) are common.

- **Invoice and contract management** combines the invoice audit function with the accounts payable invoice processing function.

- **Usage management** helps identify cost objectives and usage permissions by using call accounting and detailed invoice data. Usage is tracked to allocate costs by individual, department, cost center or other user-defined spending categories across corporate locations.
• **Dispute management** ensures the recovery of credits and management of short-pay and no-pay decisions.

• **Reporting and business intelligence** encompasses a vendor’s ability to offer customers practical information and analytics to improve financial forecasts and usage planning.

Gartner does not consider TEM solutions around element management for telecom infrastructure such as PBX and key telephone systems, Internet Protocol (IP) telephone equipment, and other voice communications infrastructure. Element management is covered in a typical network IT engagement. Over-the-air MDM is increasingly bundled with TEM offerings. Managed mobility services are an adjacent market, which many TEM players are morphing into.

**Note 3 M&A Activity**

While consolidation is sometimes thought to reduce buyer choice and increase pricing, this has not yet been observed in the TEM market. M&A acquisitions may continue over the next two years for technological enhancements and to enhance service delivery capabilities and scale in different geographic regions. Examples of consolidations include TEM providers expanding and enhancing technical capabilities through acquisitions.

In December 2020, Calero Software and MDSL completed their merger. Oak Hill Capital will make a significant new investment — joining Riverside Partners, Calero’s existing financial sponsor — as the lead investors in a growth recapitalization of Calero and subsequent funding of the combination with MDSL. Sumeru Equity Partners, MDSL’s financial backer, will also continue as a significant investor in the combined business.

**Note 4 Examples of Additional Vendors**

Table 3 is a nonexhaustive list of other vendors currently active in the TEM market.

<table>
<thead>
<tr>
<th>Vendor</th>
<th>TEM Type</th>
<th>Geographic Location</th>
</tr>
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<tbody>
<tr>
<td>Bluewater</td>
<td>Mobile-Only TEM</td>
<td>Australia</td>
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<tr>
<td>Mobile Solutions</td>
<td>Mobile-Only TEM</td>
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<tr>
<td>Vendor</td>
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<td>Mobilise IT</td>
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<td>Simplify Wireless</td>
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<td>vMOX</td>
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<tr>
<td>VoicePlus</td>
<td>Australia</td>
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<tr>
<td>Cloud TEM</td>
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<tr>
<td>CloudCheckr</td>
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<tr>
<td>Other Regional TEMs (Wireline and Wireless)</td>
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<tr>
<td>Advantix</td>
<td>North America</td>
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<tr>
<td>Saaswedo (platform only)</td>
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<td>TNX</td>
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<td>System Integrators/ITOs/Consultants</td>
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<tr>
<td>IBM</td>
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<td>Global</td>
</tr>
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Note: This is not an exhaustive list, but aims to provide additional examples. See Critical Capabilities for Managed Mobility Services, Global and Magic Quadrant for Managed Mobility Services, Global.

Source: Gartner (October 2020)

Document Revision History

Market Guide for Telecom Expense Management Services - 12 June 2019
Market Guide for Telecom Expense Management Services, 2018 - 2 May 2018

Recommended by the Authors

Magic Quadrant for Managed Mobility Services, Global
Critical Capabilities for Managed Mobility Services, Global

Recommended For You

Hype Cycle for Imaging and Print Services, 2020
Predicts 2019: Infrastructure Services
Magic Quadrant for Application Testing Services, Worldwide
Critical Capabilities for Application Testing Services, Worldwide
Hype Cycle for Application Services, 2020

Supporting Initiatives

- IT Services and Solutions
  - Track
- IT Cost Optimization, Finance, Risk and Value
  - Track