

Customer Information System (CIS) Market by Offering (Billing & Revenue Management Software, Meter Data Management Software, Customer Self-service Portals), Application (Service Order Management, Demand Response Analytics) - Global Forecast to 2030

Market Report | 2025-03-27 | 380 pages | MarketsandMarkets

AVAILABLE LICENSES:

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

Report description:

It is anticipated that the customer information system market will experience substantial growth, increasing from USD 1.79 billion in 2025 to USD 3.26 billion by 2030, with a CAGR of 12.8% throughout the forecast period. The market is driven by the growing adoption of smart grid technology, AI-powered customer analytics, and cloud-based billing solutions, particularly in the utility sector. Increasing demand for real-time data processing, personalized customer engagement, and seamless omnichannel communication is pushing organizations to invest in CIS solutions. Additionally, regulatory mandates for accurate billing and energy consumption tracking are fueling market growth. The integration of AI and automation in CIS enhances operational efficiency and improves customer satisfaction. However, a key restraint is the high implementation cost and complexity of integrating CIS with legacy IT infrastructures. Smaller utility providers often face challenges in adopting advanced solutions due to budget constraints and the technical difficulties of migrating from outdated systems.

"By offering, software segment is expected to have the largest market share during the forecast period"

The software segment is projected to dominate the customer information system (CIS) market during the forecast period due to increasing demand for advanced customer data management solutions. Utilities and businesses rely on CIS software for billing, customer service, and analytics, driving market growth. Cloud-based solutions, AI integration, and automation further enhance efficiency, boosting adoption. Rising digital transformation initiatives and regulatory compliance requirements also contribute to software's market share. Additionally, ongoing upgrades and customization options make software solutions more attractive. Compared to services or hardware, software remains the primary driver of innovation, scalability, and cost-effectiveness in the CIS market.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

"By application, demand response analytics is expected to register the fastest market growth rate during the forecast period." Demand response analytics is projected to experience the fastest growth in the Customer Information System (CIS) market due to increasing adoption by utilities for energy efficiency and grid optimization. As smart grids and real-time energy monitoring expand, utilities rely on demand response analytics to manage consumption patterns, reduce peak loads, and enhance customer engagement. The shift toward dynamic pricing models and renewable energy integration further accelerates adoption. Additionally, regulatory mandates and growing investments in data-driven decision-making contribute to its rapid expansion, making it a crucial application in the CIS market during the forecast period.

"By end user, Electricity & Power Distribution is expected to have the largest market share during the forecast period." The Electricity & Power Distribution sector is expected to dominate the Customer Information System (CIS) market during the forecast period due to rising energy demand, grid modernization, and digital transformation. Utilities increasingly adopt CIS solutions to enhance customer engagement, optimize billing, and improve outage management. Smart meters, renewable integration, and regulatory compliance further drive adoption. CIS enables real-time data analytics, seamless customer interactions, and efficient resource management. With increasing investments in smart grids and automation, power utilities prioritize advanced CIS solutions to streamline operations and improve service reliability, making Electricity & Power Distribution the largest segment in the market.□

"By region, North America to have the largest market share in 2025 and Asia Pacific will account for fastest growth rate between 2025 to 2030."

North America holds the largest market share in the customer information system (CIS) market due to its advanced technological infrastructure, high adoption of digital transformation strategies, and the presence of key market players. The region's strong focus on customer experience, data-driven decision-making, and regulatory compliance further drives the demand for CIS solutions. Moreover, industries such as banking, utilities, and telecommunications in North America have been early adopters of cloud-based and AI-driven customer information systems, further solidifying their dominance in the market. Meanwhile, the Asia-Pacific region is projected to experience the fastest growth rate between 2025 and 2030. This rapid expansion is driven by increasing digitalization, a rising number of internet users, and growing investments in smart infrastructure across countries like China, India, and Japan. Governments and enterprises in APAC are adopting AI, IoT, and big data analytics to enhance customer engagement, leading to a surge in demand for CIS solutions. Additionally, the region's expanding utility and telecom sectors, coupled with rising consumer expectations for personalized services, are accelerating the adoption of CIS platforms. The presence of emerging economies with untapped market potential makes APAC a key driver of future growth.

Breakdown of primaries

In-depth interviews were conducted with Chief Executive Officers (CEOs), innovation and technology directors, system integrators, and executives from various key organizations operating in the customer information system market.

□By Company: Tier I - 23%, Tier II - 47%, and Tier III - 30%

□By Designation: Directors- 38%, Managers - 48%, and others - 14%

□By Region: North America - 42%, Europe - 30%, Asia Pacific - 15%, Middle East & Africa -5%, and Latin America- 8%

The report includes the study of key players offering customer information system solutions. It profiles major vendors in the customer information system market. The major players in the customer information system market include Oracle (US), SAP (Germany), IBM (US), Wipro (India), Hansen Technologies (Australia), Engineering Group (Italy), Gentrack (New Zealand), Minsait (Spain), CSG International (US), Solteq (Finland), EG (Denmark), Inhemeter (China), i3 Verticals (US), Itineris (Belgium), Fluentgrid (India), Asseco Group (Poland), Meridian Cooperative (US), Smart Energy Water (US), Open Intelligence (US), Cayenta (Canada), Advanced Utility Systems (Canada), Ferranti Computer Systems (Belgium), NorthStar Utilities Solutions (Canada), VertexOne (US), Tally Group (Australia), Avertra (US), Cogsdale (Canada), inHANCE Utilities Solutions (US), Efluid (France), Milsoft Utility Solutions (US), Bynry (US), Starnik (US), SpryPoint (Canada), Continental Utility Solutions, Inc. (US), MaxBill (UK), SkyBill (Latvia).

Research coverage

This research report categorizes the customer information system Market by offering (software and services), by application (customer data storage & retrieval, billing & payment automation, metering data integration, service order management, usage analytics & reporting, demand response analytics, communication tools, and other applications), by deployment mode (cloud and on-premises) by end user (electricity & power distribution utilities, water & wastewater management utilities, gas utilities, and

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

renewable energy utilities) and by Region (North America, Europe, the Middle East and Africa, Asia Pacific, and Latin America). The scope of the report covers detailed information regarding the major factors, such as drivers, restraints, challenges, and opportunities, influencing the growth of the customer information system market. A detailed analysis of the key industry players has been done to provide insights into their business overview, solutions, and services; key strategies; contracts, partnerships, agreements, new product & service launches, mergers and acquisitions, and recent developments associated with the customer information system market. Competitive analysis of upcoming startups in the customer information system market ecosystem is covered in this report.

Key Benefits of Buying the Report

The report would provide the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall customer information system market and its subsegments. It would help stakeholders understand the competitive landscape and gain more insights better to position their business and plan suitable go-to-market strategies. It also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

□ Analysis of key drivers (Regulatory compliance & government mandates, shift to smart grids & advanced metering infrastructure (AMI), digital transformation in utilities, rising utility customer expectations), restraints (High implementation & upgrade costs, limited customization in off-the-shelf CIS), opportunities (Integration with AI & data analytics, demand for personalized tariff structures, utility E-marketplace & value-added services), and challenges (Interoperability between legacy & modern systems, cybersecurity & compliance pressure).

□ Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the customer information system market.

□ Market Development: Comprehensive information about lucrative markets - the report analyses the customer information system market across varied regions.

□ Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the customer information system market.

□ Competitive Assessment: In-depth assessment of market shares, growth strategies and service offerings of leading players like Oracle (US), SAP (Germany), IBM (US), Wipro (India), Hansen Technologies (Australia), Engineering Group (Italy), Gentrack (New Zealand), Minsait (Spain), CSG International (US), Solteq (Finland), EG (Denmark), Inhemeter (China), i3 Verticals (US), Itineris (Belgium), Fluentgrid (India), Asseco Group (Poland), Meridian Cooperative (US), Smart Energy Water (US), Open Intelligence (US), Cayenta (Canada), Advanced Utility Systems (Canada), Ferranti Computer Systems (Belgium), NorthStar Utilities Solutions (Canada), VertexOne (US), Tally Group (Australia), Avertra (US), Cogsdale (Canada), inHANCE Utilities Solutions (US), Efluid (France), Milsoft Utility Solutions (US), Bynry (US), Starnik (US), SpryPoint (Canada), Continental Utility Solutions, Inc. (US), MaxBill (UK), SkyBill (Latvia) among others in the customer information system market. The report also helps stakeholders understand the pulse of the customer information system market and provides them with information on key market drivers, restraints, challenges, and opportunities.

Table of Contents:

1	INTRODUCTION	37
1.1	STUDY OBJECTIVES	37
1.2	MARKET DEFINITION	37
1.2.1	INCLUSIONS AND EXCLUSIONS	38
1.3	MARKET SCOPE	39
1.3.1	MARKET SEGMENTATION	39
1.3.2	YEARS CONSIDERED	40
1.4	CURRENCY CONSIDERED	40
1.5	STAKEHOLDERS	40
1.6	SUMMARY OF CHANGES	41

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

2	RESEARCH METHODOLOGY	43
2.1	RESEARCH DATA	43
2.1.1	SECONDARY DATA	44
2.1.2	PRIMARY DATA	44
2.1.2.1	Breakup of primary profiles	45
2.1.2.2	Key industry insights	45
2.2	MARKET BREAKUP AND DATA TRIANGULATION	46
2.3	MARKET SIZE ESTIMATION	47
2.3.1	TOP-DOWN APPROACH	47
2.3.2	BOTTOM-UP APPROACH	48
2.4	MARKET FORECAST	52
2.5	RESEARCH ASSUMPTIONS	53
2.6	RESEARCH LIMITATIONS	55
3	EXECUTIVE SUMMARY	56
4	PREMIUM INSIGHTS	63
4.1	ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN CUSTOMER INFORMATION SYSTEM MARKET	63
4.2	CUSTOMER INFORMATION SYSTEM MARKET: TOP THREE APPLICATIONS	64
4.3	NORTH AMERICA: CUSTOMER INFORMATION SYSTEM MARKET, BY SOFTWARE AND END USER	65
4.4	CUSTOMER INFORMATION SYSTEM MARKET, BY REGION	66
5	MARKET OVERVIEW AND INDUSTRY TRENDS	67
5.1	INTRODUCTION	67
5.2	MARKET DYNAMICS	67
5.2.1	DRIVERS	68
5.2.1.1	Regulatory compliance and government mandates	68
5.2.1.2	Shift to smart grids and advanced metering infrastructure	68
5.2.1.3	Digital transformation in utilities	69
5.2.1.4	Rising utility customer expectations	69
5.2.2	RESTRAINTS	69
5.2.2.1	High implementation and upgrade costs	69
5.2.2.2	Limited customization in off-the-shelf CIS	70
5.2.3	OPPORTUNITIES	70
5.2.3.1	Integration with AI and data analytics	70
5.2.3.2	Demand for personalized tariff structures	70
5.2.3.3	Utility e-marketplace and value-added services	71
5.2.4	CHALLENGES	71
5.2.4.1	Interoperability between legacy and modern systems	71
5.2.4.2	Cybersecurity and compliance pressure	71
5.3	EVOLUTION OF CUSTOMER INFORMATION SYSTEM MARKET	72
5.4	SUPPLY CHAIN ANALYSIS	74
5.5	ECOSYSTEM ANALYSIS	76
5.5.1	CUSTOMER DATA MANAGEMENT PLATFORM PROVIDERS	78
5.5.2	BILLING & REVENUE MANAGEMENT SOFTWARE PROVIDERS	78
5.5.3	CUSTOMER ANALYTICS PLATFORM PROVIDERS	78
5.5.4	WORKFLOW AUTOMATION TOOLS PROVIDERS	78

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

5.5.5	METER DATA MANAGEMENT SYSTEM PROVIDERS	78
5.5.6	CUSTOMER SELF-SERVICE PORTAL PROVIDERS	79
5.5.7	CRM INTEGRATION SOFTWARE PROVIDERS	79
5.5.8	OTHER CIS SOFTWARE PROVIDERS	79
5.6	INVESTMENT AND FUNDING SCENARIO	79
5.7	IMPACT OF GENERATIVE AI ON CUSTOMER INFORMATION SYSTEM MARKET	80
5.7.1	SMART BILLING & PAYMENT MANAGEMENT	81
5.7.2	PROACTIVE OUTAGE & MAINTENANCE ALERTS	82
5.7.3	PERSONALIZED ENERGY CONSUMPTION INSIGHTS	82
5.7.4	VIRTUAL CUSTOMER ASSISTANTS	82
5.7.5	FRAUD & ANOMALY DETECTION	82
5.7.6	DYNAMIC DEMAND RESPONSE PROGRAMS	82
5.8	CASE STUDY ANALYSIS	83
5.8.1	CASE STUDY 1: SHELBY CITY AND NORTHSTAR UTILITIES SOLUTIONS TRANSFORM UTILITY MANAGEMENT WITH DIGITAL INNOVATION	83
5.8.2	CASE STUDY 2: EFIGAS TRANSFORMS CUSTOMER SERVICE AND BUSINESS OPERATIONS WITH OPEN INTELLIGENCE'S SMARTFLEX	83
5.8.3	CASE STUDY 3: SHELL ENERGY ENHANCES SMART BILLING AND CUSTOMER-CENTRIC SOLUTIONS WITH MAXBILL	84
5.8.4	CASE STUDY 4: FIRST BUSINESS WATER TRANSFORMS BILLING EFFICIENCY WITH SKYBILL'S AUTOMATED AND INTEGRATED SOLUTION	85
5.8.5	CASE STUDY 5: NDMC AND FLUENTGRID ACHIEVE INDIA'S FIRST 100% SMART METERED MUNICIPALITY FOR EFFICIENT POWER MANAGEMENT	85
5.9	TECHNOLOGY ANALYSIS	86
5.9.1	KEY TECHNOLOGIES	86
5.9.1.1	Customer relationship management	86
5.9.1.2	Enterprise resource planning	86
5.9.1.3	Workforce management	87
5.9.1.4	Geographic information systems	87
5.9.1.5	Advanced metering infrastructure	87
5.9.2	COMPLEMENTARY TECHNOLOGIES	88
5.9.2.1	Data analytics & business intelligence	88
5.9.2.2	Chatbots & virtual assistants	88
5.9.2.3	Blockchain	88
5.9.2.4	Cloud computing	89
5.9.2.5	Demand response management systems	89
5.9.3	ADJACENT TECHNOLOGIES	89
5.9.3.1	IoT	89
5.9.3.2	Edge computing	90
5.9.3.3	Asset performance management	90
5.9.3.4	Smart home & smart city technologies	90
5.10	REGULATORY LANDSCAPE	90
5.10.1	REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	91
5.10.2	KEY REGULATIONS	95
5.10.2.1	North America	95
5.10.2.1.1	Gramm-Leach-Bliley Act (GLBA) (US)	95
5.10.2.1.2	California Consumer Privacy Act (CCPA) (US)	96
5.10.2.1.3	Personal Information Protection and Electronic Documents Act (PIPEDA) (Canada)	96

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

5.10.2.1.4	Canada's Anti-Spam Legislation (CASL) (Canada)	96
5.10.2.2	Europe	97
5.10.2.2.1	General Data Protection Regulation (GDPR) (European Union)	97
5.10.2.2.2	Network and Information Security (NIS2) Directive (European Union)	97
5.10.2.2.3	Federal Data Protection Act (BDSG) (Germany)	97
5.10.2.2.4	French Data Protection Act (Loi Informatique et Libertes) (France)	97
?		
5.10.2.3	Asia Pacific	98
5.10.2.3.1	Personal Information Protection Law (PIPL) (China)	98
5.10.2.3.2	Digital Personal Data Protection Act (DPDP) (India)	98
5.10.2.3.3	Act on the Protection of Personal Information (APPI) (Japan)	98
5.10.2.3.4	Telecommunications and Other Legislation Amendment (Assistance and Access) Act (Australia)	98
5.10.2.3.5	Personal Information Protection Act (PIPA) (South Korea)	99
5.10.2.4	Middle East & Africa	99
5.10.2.4.1	Federal Personal Data Protection Law (PDPL) (UAE)	99
5.10.2.4.2	Personal Data Protection Law (PDPL) (Saudi Arabia)	99
5.10.2.4.3	Personal Data Privacy Protection Law (Law No. 13) (Qatar)	100
5.10.2.5	Latin America	100
5.10.2.5.1	General Data Protection Law (Lei Geral de Protecao de Dados - LGPD) (Brazil)	100
5.10.2.5.2	Federal Law on the Protection of Personal Data Held by Private Parties (LFPDPPP) (Mexico)	100
5.11	PATENT ANALYSIS	101
5.11.1	METHODOLOGY	101
5.11.2	PATENTS FILED, BY DOCUMENT TYPE	101
5.11.3	INNOVATION AND PATENT APPLICATIONS	102
5.12	PRICING ANALYSIS	105
5.12.1	AVERAGE SELLING PRICE OF OFFERINGS, BY KEY PLAYER, 2024	105
5.12.2	AVERAGE SELLING PRICE OF APPLICATIONS, BY KEY PLAYER, 2024	106
5.13	KEY CONFERENCES AND EVENTS, 2025-2026	108
5.14	PORTER'S FIVE FORCES ANALYSIS	109
5.14.1	THREAT OF NEW ENTRANTS	110
5.14.2	THREAT OF SUBSTITUTES	110
5.14.3	BARGAINING POWER OF SUPPLIERS	110
5.14.4	BARGAINING POWER OF BUYERS	110
5.14.5	INTENSITY OF COMPETITIVE RIVALRY	111
5.15	KEY STAKEHOLDERS AND BUYING CRITERIA	111
5.15.1	KEY STAKEHOLDERS IN BUYING PROCESS	111
5.15.2	BUYING CRITERIA	112
5.16	TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESS	113
6	CUSTOMER INFORMATION SYSTEM MARKET, BY OFFERING	114
6.1	INTRODUCTION	115
6.1.1	OFFERING: CUSTOMER INFORMATION SYSTEM MARKET DRIVERS	115
6.2	SOFTWARE	117
6.2.1	CUSTOMER DATA MANAGEMENT PLATFORMS	119
6.2.1.1	Transforming utility data management with AI-driven customer data platforms	119
?		
6.2.2	BILLING & REVENUE MANAGEMENT SOFTWARE	120
6.2.2.1	Revolutionizing financial efficiency with automated billing & revenue management software	120

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

6.2.3	CUSTOMER ANALYTICS PLATFORMS	121
6.2.3.1	Harnessing AI-powered analytics to unlock customer insights and drive business growth	121
6.2.4	WORKFLOW AUTOMATION TOOLS	123
6.2.4.1	Streamlining utility business operations with AI-driven workflow automation	123
6.2.5	METER DATA MANAGEMENT SYSTEMS	124
6.2.5.1	Optimizing utility efficiency with smart meter data management and analytics	124
6.2.6	CUSTOMER SELF-SERVICE PORTALS	125
6.2.6.1	Transforming customer engagement with AI-powered self-service platforms for instant access and support	125
6.2.7	CRM INTEGRATION SOFTWARE	127
6.2.7.1	Enhancing utility customer engagement through seamless CIS-CRM integration	127
6.2.8	OTHER SOFTWARE	128
6.3	SERVICES	129
6.3.1	IMPLEMENTATION & INTEGRATION SERVICES	132
6.3.1.1	Enabling seamless CIS deployment and system interoperability for utilities	132
6.3.2	CONSULTING SERVICES	133
6.3.2.1	Helping utilities navigate compliance, aligning CIS functionalities with industry regulations and security standards	133
6.3.3	MAINTENANCE & SUPPORT SERVICES	134
6.3.3.1	Maximizing CIS reliability and security through proactive maintenance & support	134
6.3.4	MANAGED SERVICES	135
6.3.4.1	Enhancing efficiency and ensuring regulatory compliance to focus on innovation and long-term growth	135
7	CUSTOMER INFORMATION SYSTEM MARKET, BY DEPLOYMENT MODE	137
7.1	INTRODUCTION	138
7.1.1	DEPLOYMENT MODE: CUSTOMER INFORMATION SYSTEM MARKET DRIVERS	138
7.2	ON-PREMISES	140
7.2.1	ENSURING DATA SECURITY AND COMPLIANCE WITH ON-PREMISES CIS DEPLOYMENT IN UTILITIES	140
7.3	CLOUD	141
7.3.1	PUBLIC CLOUD	143
7.3.1.1	Enhancing utility operations with scalable and cost-efficient public cloud CIS deployment	143
7.3.2	PRIVATE CLOUD	145
7.3.2.1	Ensuring secure and scalable CIS operations with private cloud deployment in utilities	145
7.3.3	HYBRID CLOUD	146
7.3.3.1	Optimizing utility CIS with flexible, secure, and scalable hybrid cloud deployment	146
8	CUSTOMER INFORMATION SYSTEM MARKET, BY APPLICATION	148
8.1	INTRODUCTION	149
8.1.1	APPLICATION: CUSTOMER INFORMATION SYSTEM MARKET DRIVERS	149
8.2	CUSTOMER DATA STORAGE & RETRIEVAL	151
8.2.1	ENHANCING UTILITY OPERATIONS WITH SECURE, SCALABLE, AND AI-DRIVEN CUSTOMER DATA MANAGEMENT	151
8.3	BILLING & PAYMENT AUTOMATION	152
8.3.1	OPTIMIZING REVENUE COLLECTION WITH INTELLIGENT AND AUTOMATED BILLING SOLUTIONS	152
8.4	METERING DATA INTEGRATION	153
8.4.1	ENABLING REAL-TIME CONSUMPTION TRACKING, GRID OPTIMIZATION, AND ACCURATE BILLING THROUGH SMART METER INTEGRATION	153
8.5	SERVICE ORDER MANAGEMENT	154
8.5.1	ENHANCING UTILITY EFFICIENCY AND CUSTOMER SATISFACTION WITH AUTOMATED SERVICE ORDER MANAGEMENT	154
8.6	USAGE ANALYTICS & REPORTING	156
8.6.1	TRANSFORMING UTILITIES BY ENABLING DATA-DRIVEN DECISION-MAKING AND IMPROVED CUSTOMER ENGAGEMENT	156
8.7	DEMAND RESPONSE ANALYTICS	157

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

8.7.1	OPTIMIZING GRID STABILITY AND ENERGY EFFICIENCY WITH AI-DRIVEN DEMAND RESPONSE ANALYTICS	157
8.8	COMMUNICATION TOOLS	158
8.8.1	DELIVERING EFFICIENT AND CUSTOMER-CENTRIC INTERACTIONS WITH CIS-POWERED COMMUNICATION TOOLS	158
8.9	OTHER APPLICATIONS	159
9	CUSTOMER INFORMATION SYSTEM MARKET, BY END USER	160
9.1	INTRODUCTION	161
9.1.1	END USER: CUSTOMER INFORMATION SYSTEM MARKET DRIVERS	161
9.2	ELECTRICITY & POWER DISTRIBUTION UTILITIES	163
9.2.1	ELECTRICITY DISTRIBUTION UTILITIES	165
9.2.1.1	Empowering utilities with predictive maintenance to anticipate equipment failures and minimize disruptions	165
9.2.2	RETAIL ELECTRICITY PROVIDERS	166
9.2.2.1	Enabling retail electricity providers to implement personalized energy plans for diverse customer needs	166
9.3	WATER & WASTEWATER MANAGEMENT UTILITIES	167
9.3.1	POTABLE WATER UTILITIES	170
9.3.1.1	Enabling real-time water consumption tracking to help utilities detect leaks and reduce non-revenue water losses	170
9.3.2	WASTEWATER TREATMENT UTILITIES	171
9.3.2.1	Facilitating automated reporting of wastewater discharge levels, ensuring adherence to pollution control regulations	171
9.4	GAS UTILITIES	172
9.4.1	RIISING ADOPTION OF SMART GAS METERS, REAL-TIME CONSUMPTION TRACKING, AND DECARBONIZATION POLICIES TO DRIVE DEMAND FOR CIS	172
9.5	RENEWABLE ENERGY UTILITIES	174
9.5.1	SOLAR ENERGY UTILITIES	176
9.5.1.1	Enabling solar utilities to balance supply and demand	176
9.5.2	WIND ENERGY UTILITIES	177
9.5.2.1	Enhancing customer satisfaction and supporting large-scale integration of wind power into modern electricity grids	177
9.5.3	HYDROELECTRIC ENERGY UTILITIES	178
9.5.3.1	Need for pumped storage hydro integration, grid balancing capabilities, and enhanced wholesale power transactions flexibility to drive CIS adoption	178
9.5.4	BIOMASS ENERGY UTILITIES	179
9.5.4.1	Increasing complexity of biomass fuel procurement, variable generation costs, and multi-tiered billing structures to drive demand for CIS solutions	179
9.5.5	OTHER RENEWABLE ENERGY UTILITIES	181
10	CUSTOMER INFORMATION SYSTEM MARKET, BY REGION	183
10.1	INTRODUCTION	184
10.2	NORTH AMERICA	186
10.2.1	NORTH AMERICA: CUSTOMER INFORMATION SYSTEM MARKET DRIVERS	186
10.2.2	NORTH AMERICA: MACROECONOMIC OUTLOOK	186
10.2.3	US	195
10.2.3.1	Digital transformation, regulatory compliance, and demand for real-time data access to drive market	195
10.2.4	CANADA	196
10.2.4.1	Increasing cloud adoption, AI integration, and regulatory compliance to drive market	196
10.3	EUROPE	197
10.3.1	EUROPE: CUSTOMER INFORMATION SYSTEM MARKET DRIVERS	197
10.3.2	EUROPE: MACROECONOMIC OUTLOOK	197
10.3.3	UK	205

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

10.3.3.1	Regulatory shifts, digitalization, and growing need for enhanced customer engagement to drive market	205
10.3.4	GERMANY	206
10.3.4.1	Replacement of legacy systems with cloud-based CIS platforms for improved operational efficiency and customer service to drive market	206
10.3.5	FRANCE	207
10.3.5.1	Regulatory changes and stricter consumer protection laws to compel utilities to invest in more agile CIS platforms	207
10.3.6	ITALY	208
10.3.6.1	Regulatory pressures, digitalization, and increasing focus on decentralized energy management to drive the market	208
10.3.7	SPAIN	209
10.3.7.1	Increasing focus on interoperability, cybersecurity, and AI-driven automation to drive market	209
10.3.8	REST OF EUROPE	210
10.4	ASIA PACIFIC	211
10.4.1	ASIA PACIFIC: CUSTOMER INFORMATION SYSTEM MARKET DRIVERS	211
10.4.2	ASIA PACIFIC: MACROECONOMIC OUTLOOK	212
10.4.3	CHINA	220
10.4.3.1	Need to streamline billing processes and manage customer interactions to drive market	220
10.4.4	INDIA	221
10.4.4.1	Technological advancements, strategic government initiatives, and rising digital economy to drive market	221
10.4.5	JAPAN	222
10.4.5.1	Growing need to optimize power distribution and reduce wastage in utilities to drive market	222
10.4.6	SOUTH KOREA	224
10.4.6.1	Need for utilities to comply with environmental standards while enhancing customer trust to drive market	224
10.4.7	AUSTRALIA & NEW ZEALAND	225
10.4.7.1	Technological innovations and government initiatives for enhanced service delivery across sectors to drive market	225
10.4.8	PAKISTAN	226
10.4.8.1	Technological advancements and government initiatives to drive market	226
10.4.9	ASEAN	227
10.4.9.1	Philippines	229
10.4.9.1.1	Technological advancements and supportive government initiatives for enhanced service delivery across sectors to drive market	229
10.4.9.2	Malaysia	230
10.4.9.2.1	Strategic government initiatives and substantial investments from global technology firms to drive market	230
10.4.9.3	Singapore	231
10.4.9.3.1	Increasing focus on digital transformation and sustainability to drive market	231
10.4.9.4	Rest of ASEAN	232
10.4.10	REST OF ASIA PACIFIC	233
10.5	MIDDLE EAST & AFRICA	234
10.5.1	MIDDLE EAST & AFRICA: CUSTOMER INFORMATION SYSTEM MARKET DRIVERS	234
10.5.2	MIDDLE EAST & AFRICA: MACROECONOMIC OUTLOOK	234
10.5.3	UAE	242
10.5.3.1	Rising demand for advanced customer engagement tools, blockchain-based energy transactions, and AI-powered customer service solutions to drive market	242
10.5.4	SAUDI ARABIA	243
10.5.4.1	Growing focus on customer service efficiency, billing accuracy, and energy consumption analytics to drive market	243
10.5.5	SOUTH AFRICA	244

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

10.5.5.1	Digital transformation and utility digitalization initiatives to drive market	244
10.5.6	REST OF MIDDLE EAST & AFRICA	245
10.6	LATIN AMERICA	246
10.6.1	LATIN AMERICA: CUSTOMER INFORMATION SYSTEM MARKET DRIVERS	246
10.6.2	LATIN AMERICA: MACROECONOMIC OUTLOOK	247
10.6.3	BRAZIL	254
10.6.3.1	Regulatory changes and infrastructure upgrades to drive market	254
10.6.4	MEXICO	255
10.6.4.1	Growing demand for smart meters and connected assets for enhanced customer data collection and real-time energy usage tracking to drive market	255
10.6.5	ARGENTINA	256
10.6.5.1	Increasing investments in smart grid technologies and government-backed digital initiatives to drive market	256
10.6.6	PERU	257
10.6.6.1	Evolving regulatory frameworks and infrastructure investments to drive demand for advanced CIS solutions	257
10.6.7	COLOMBIA	258
10.6.7.1	Smart grid expansion and digital utility reforms to drive market	258
10.6.8	REST OF LATIN AMERICA	259
11	COMPETITIVE LANDSCAPE	261
11.1	OVERVIEW	261
11.2	KEY PLAYERS STRATEGIES/RIGHT TO WIN, 2022-2024	261
11.3	REVENUE ANALYSIS, 2020-2024	263
11.4	MARKET SHARE ANALYSIS, 2024	265
11.4.1	MARKET SHARE OF KEY PLAYERS OFFERING CUSTOMER INFORMATION SYSTEMS, 2024	265
11.4.1.1	Market ranking analysis	266
11.5	PRODUCT COMPARISON	268
11.5.1	PRODUCT COMPARATIVE ANALYSIS, BY BILLING & REVENUE MANAGEMENT SOFTWARE	268
11.5.2	PRODUCT COMPARATIVE ANALYSIS, BY METER DATA MANAGEMENT SOLUTIONS	270
?		
11.6	COMPANY VALUATION AND FINANCIAL METRICS	271
11.7	COMPANY EVALUATION MATRIX: KEY PLAYERS, 2024	272
11.7.1	STARS	272
11.7.2	EMERGING LEADERS	272
11.7.3	PERVASIVE PLAYERS	273
11.7.4	PARTICIPANTS	273
11.7.5	COMPANY FOOTPRINT: KEY PLAYERS, 2024	274
11.7.5.1	Company footprint	274
11.7.5.2	Regional footprint	275
11.7.5.3	Offering footprint	276
11.7.5.4	Application footprint	277
11.7.5.5	End user footprint	278
11.8	COMPANY EVALUATION MATRIX: STARTUPS/SMES, 2024	279
11.8.1	PROGRESSIVE COMPANIES	279
11.8.2	RESPONSIVE COMPANIES	279
11.8.3	DYNAMIC COMPANIES	279
11.8.4	STARTING BLOCKS	279
11.8.5	COMPETITIVE BENCHMARKING: STARTUPS/SMES, 2024	281
11.8.5.1	Detailed list of key startups/SMEs	281

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

11.8.5.2	Competitive benchmarking of key startups/SMEs	283
11.9	COMPETITIVE SCENARIO	284
11.9.1	PRODUCT LAUNCHES AND ENHANCEMENTS	284
11.9.2	DEALS	286
12	COMPANY PROFILES	290
12.1	INTRODUCTION	290
12.2	KEY PLAYERS	290
12.2.1	GENTRACK	290
12.2.1.1	Business overview	290
12.2.1.2	Products/Solutions/Services offered	291
12.2.1.3	Recent developments	292
12.2.1.3.1	Product launches and enhancements	292
12.2.1.3.2	Deals	292
12.2.1.4	MnM view	294
12.2.1.4.1	Key strengths	294
12.2.1.4.2	Strategic choices	294
12.2.1.4.3	Weaknesses and competitive threats	294
12.2.2	ORACLE	295
12.2.2.1	Business overview	295
12.2.2.2	Products/Solutions/Services offered	296
	?	
12.2.2.3	Recent developments	297
12.2.2.3.1	Product launches and enhancements	297
12.2.2.3.2	Deals	298
12.2.2.4	MnM view	298
12.2.2.4.1	Key strengths	298
12.2.2.4.2	Strategic choices	299
12.2.2.4.3	Weaknesses and competitive threats	299
12.2.3	SAP	300
12.2.3.1	Business overview	300
12.2.3.2	Products/Solutions/Services offered	301
12.2.3.3	Recent developments	302
12.2.3.3.1	Product launches and enhancements	302
12.2.3.3.2	Deals	302
12.2.3.4	MnM view	302
12.2.3.4.1	Key strengths	302
12.2.3.4.2	Strategic choices	303
12.2.3.4.3	Weaknesses and competitive threats	303
12.2.4	HANSEN TECHNOLOGIES	304
12.2.4.1	Business overview	304
12.2.4.2	Products/Solutions/Services offered	305
12.2.4.3	Recent developments	306
12.2.4.3.1	Product launches and enhancements	306
12.2.4.3.2	Deals	306
12.2.4.4	MnM view	307
12.2.4.4.1	Key strengths	307
12.2.4.4.2	Strategic choices	307

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

12.2.4.4.3	Weaknesses and competitive threats	308
12.2.5	3 VERTICALS	309
12.2.5.1	Business overview	309
12.2.5.2	Products/Solutions/Services offered	310
12.2.5.3	Recent developments	311
12.2.5.3.1	Product launches and enhancements	311
12.2.5.4	MnM view	311
12.2.5.4.1	Key strengths	311
12.2.5.4.2	Strategic choices	311
12.2.5.4.3	Weaknesses and competitive threats	312
12.2.6	MINSAIT	313
12.2.6.1	Business overview	313
12.2.6.2	Products/Solutions/Services offered	313
12.2.6.3	Recent developments	314
12.2.6.3.1	Product launches and enhancements	314
12.2.6.3.2	Deals	315
12.2.7	CSG INTERNATIONAL	316
12.2.7.1	Business overview	316
12.2.7.2	Products/Solutions/Services offered	317
12.2.8	SOLTEQ	318
12.2.8.1	Business overview	318
12.2.8.2	Products/Solutions/Services offered	319
12.2.8.3	Recent developments	320
12.2.8.3.1	Deals	320
12.2.9	WIPRO	321
12.2.9.1	Business overview	321
12.2.9.2	Products/Solutions/Services offered	322
12.2.10	IBM	323
12.2.10.1	Business overview	323
12.2.10.2	Products/Solutions/Services offered	324
12.2.10.3	Recent developments	325
12.2.10.3.1	Product launches and enhancements	325
12.2.11	ASSECO UTILITY MANAGEMENT SOLUTIONS	326
12.2.12	EG	327
12.2.13	INHEMETER	328
12.2.14	ENGINEERING GROUP	329
12.2.15	ITINERIS	330
12.2.16	FLUENTGRID	331
12.2.17	MERIDIAN COOPERATIVE	332
12.2.18	KRAKEN TECHNOLOGIES	333
12.2.19	SMART ENERGY WATER	334
12.3	STARTUPS/SMES	335
12.3.1	OPEN INTELLIGENCE	335
12.3.2	CAYENTA	336
12.3.3	ADVANCED UTILITY SYSTEMS	337
12.3.4	FERRANTI COMPUTER SYSTEMS	338
12.3.5	NORTHSTAR UTILITIES SOLUTIONS	339

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

12.3.6	VERTEXONE	340
12.3.7	TALLY GROUP	341
12.3.8	AVERTRA	342
12.3.9	COGSDALE	343
12.3.10	INHANCE UTILITIES SOLUTIONS	344
12.3.11	EFLUID	345
12.3.12	MILSOFT UTILITY SOLUTIONS	346
12.3.13	BYNRY	347
12.3.14	STARNIK	348
12.3.15	SPRYPOINT	349
12.3.16	CONTINENTAL UTILITY SOLUTIONS, INC.	350
12.3.17	MAXBILL	351
12.3.18	SKYBILL	352
12.3.19	KALUZA	353
13	ADJACENT AND RELATED MARKETS	354
13.1	INTRODUCTION	354
13.2	CUSTOMER DATA PLATFORM MARKET - GLOBAL FORECAST TO 2028	354
13.2.1	MARKET DEFINITION	354
13.2.2	MARKET OVERVIEW	354
13.2.2.1	Customer data platform market, by offering	356
13.2.2.2	Customer data platform market, by data channel	356
13.2.2.3	Customer data platform market, by type	357
13.2.2.4	Customer data platform market, by application	358
13.2.2.5	Customer data platform market, by vertical	359
13.2.2.6	Customer data platform market, by region	360
13.3	SMART GRID ANALYTICS MARKET - GLOBAL FORECAST TO 2029	361
13.3.1	MARKET DEFINITION	361
13.3.2	MARKET OVERVIEW	362
13.3.2.1	Smart grid analytics market, by offering	364
13.3.2.2	Smart grid analytics market, by organization size	365
13.3.2.3	Smart grid analytics market, by application	366
13.3.2.4	Smart grid analytics market, by analytics type	368
13.3.2.5	Smart grid analytics market, by region	369
14	APPENDIX	370
14.1	DISCUSSION GUIDE	370
14.2	KNOWLEDGESTORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL	376
14.3	CUSTOMIZATION OPTIONS	378
14.4	RELATED REPORTS	378
14.5	AUTHOR DETAILS	379

Customer Information System (CIS) Market by Offering (Billing & Revenue Management Software, Meter Data Management Software, Customer Self-service Portals), Application (Service Order Management, Demand Response Analytics) - Global Forecast to 2030

Market Report | 2025-03-27 | 380 pages | MarketsandMarkets

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User	\$4950.00
	Multi User	\$6650.00
	Corporate License	\$8150.00
	Enterprise Site License	\$10000.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

☐ ** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Zip Code*

Country*

Date

Signature