Telecom Operations Management - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Telecom Operations Management Market size is estimated at USD 77.65 billion in 2024, and is expected to reach USD 109.72 billion by 2029, growing at a CAGR of 7.16% during the forecast period (2024-2029).

With the outbreak of COVID-19, telecom companies should be well equipped to handle the operations for meeting the 30% to 40% increase in bandwidth demand on their networks as millions of employees and students became homebound. According to FieceTelecom, the coronavirus pandemic has pushed companies of all sizes to accelerate their digital transformation plans. The companies that had already engaged in the adoption of digital transformation and cloud strategies were better able to sustain in the first few weeks of the pandemic. Verizon Business' survey results echoed some of the points, including 43% of the respondents now planning to expand their businesses through digital and related technologies. Also, 30% have already added new methods for delivering their products and services digitally.

Key Highlights
-The telecommunications industry is regarded as one of the significant adopters of digital transformation, both as a key driver of worldwide digitization and as an industry witnessing a large-scale change in its market environment.
-Investment by the telecommunications industry in interoperability and technology has reinforced a paradigm shift in capital flows and information through the global economy while providing the building blocks for the emergence of entirely new business models across industries. With the rapidly growing demand for bandwidth and the increasing number of mobile Internet users, communication service providers are evolving to offer advanced and innovative solutions.
-Also, legacy networks, combined with the growing infrastructure requirements for 5G networks, have created a complex environment, making it challenging for communication service providers (CSPs). Hence, the need for the adoption of technologically advanced operations support systems in telecommunications is increasing.

-The continuously growing need for low-cost data and voice services is boosting the market growth. This is encouraging the service providers, who purchase the network services from the MNOs at wholesale rates and sell these as bundled services at lower rates than those of MNOs.

-The market studied is augmented by the increasing complexity in network architectures, as most enterprise organizations have multi-vendor, multi-cloud configurations. Furthermore, as these organizations aim to meet the demand with limited resources and streamline their change processes, they require more flexible and adaptable network architectures.

-In addition, the increasing number of services such as cloud, Machine to Machine (M2M) transactions, and mobile money are further expected to augment demand for telecom operations management over the forecast period.

-Furthermore, with businesses going mobile and adopting new concepts like BYOD to increase employee interaction and ease of use, it has become essential to provide a high speed and quality network. The organizations are looking forward to adopting BYOD aggressively in their operations, thereby fueling the market growth over the forecast period.

Telecom Operations Management Market Trends

Cloud is Expected to Witness Significant Growth

- Telecom companies worldwide are embarking on transformation journeys centered on the cloud to drive new services, revenue opportunities, and experiences. The telecom operators can accelerate the journey by combining their cloud-native, open and modular solutions with the fully managed, high-performing Cloud platform. Cloud providers are focusing on some strategic regions to support telecommunications companies. These include helping telecommunications companies monetize 5G as a business services platform, empowering them to engage their customers through data-driven experiences better, and assisting them in improving operational efficiencies across core telecom systems.

- In Oct 2021, Dell Technologies introduced new telecom software, solutions, and services to help communications service providers (CSPs) accelerate their open, cloud-native network deployments and create new revenue opportunities. New technologies like Open RAN (ORAN) give CSPs a broader set of options for deploying network infrastructure to support future growth.

- Google announced a partnership with Amdocs to enable communications service providers to run Amdocs' market-leading portfolio on Google Cloud and to deliver new data analytics, site reliability engineering, and 5G edge solutions to enterprise customers. Amdocs announced that Altice USA had gone live with Amdocs data and intelligence systems on the Google Cloud as part of the Amdocs and Google Cloud joint go-to-market initiative. Also, a new partnership with Netcracker to deploy its entire Digital BSS/OSS and Orchestration stack on Google Cloud. Service providers can now scale and purchase their mission-critical IT applications on-demand, access unlimited Google Cloud resources, reduce ownership costs, and accelerate new services' availability.

- In June 2021, AT&T partnered with Microsoft to shift its 5G mobile core network to Microsoft Azure's hybrid cloud. Microsoft is acquiring AT&T's Network Cloud platform technology that runs AT&T's 5G core. The deal also involves buying AT&T engineering and lifecycle management software that runs containerized or virtualized network services.

- Moreover, the ZENIC ONE (UME) system integrates Artificial Intelligence and Big Data for the first time to add management and control with tools and applications. Therefore, the system can collect the information related to the operation reported by the device in real-time and combine AI intelligent big data analysis to monitor the network operation status, promptly pinpoint problems and recover services, thus significantly improving the O&M efficiency. Such instances are expected to provide a strong impetus for market growth.

- As per Ericsson, the number of smartphone subscriptions worldwide surpassed six billion in 2021 and is expected to grow further by several hundred million in the next few years. This increase in users will drive market growth over the forecasted period. Additionally, initiatives such as the Digital India initiative are expected to uplift the cloud platform integration or cloud-based model in telecom operation that will drive the market growth.

North America is Expected to Hold Significant Share

- North America is anticipated to occupy a significant share in the telecom operations management market studied, owing to the region's high expenditure on business operation solutions. Besides, telecommunications in the region is highly developed with intense competition among the communication providers, which is expected further to boost the market for telecom analytics in the region. The continuous advancements in IT infrastructure and technology used for customer support, a significant number of market vendors, and the accessibility of proficient technical expertise in managing the daily operations and helpdesk software contribute toward the telecom operations management market growth region.
- The market is witnessing several new players, further driving the market growth. For instance, in July 2022, Adani Group confirmed its entry into the cellular telecom space and will do so with a rollout in 2022. The company is expected to release three new wireless service providers in Australia as part of its planned expansion into the market, making it one of the first Indian firms to enter this area. The group has also proposed to invest USD 1 billion in the North American market.
- Furthermore, the shift in consumer behavior, along with rising mobile internet adoption and smartphone, improved affordability, and the increasing availability of locally relevant content, has led to a boom in mobile services across areas such as e-commerce, financial services, video, and social media. As a result, the demand for telecom operations management has been witnessing an upward trend in North America.
- Substantial growth in connected and mobile devices is spurring the demand for enhanced network services. Since North America has always remained at the forefront of technology adoption, the region witnessed the maximum adoption of connected devices.
- For instance, according to Cisco Systems, the average number of devices and connections per capita in North America stood at 8.2 in 2018 and is expected to reach 13.4 by 2023, which is the highest amongst any other region globally. Such trends are expected to act as major drivers for growth in the regional market.
- Further, deploying technological advancements, such as IoT, multi-cloud environments, or AI, increases network architectures' complexity. According to the GSMA, the number of IoT connections in North America is expected to reach 5.4 billion in 2025, compared to 2.8 billion in 2019. Hence, deploying these technologies is increasing the demand for flexible and adaptable network architectures, thereby fueling the market growth in the region.

Telecom Operations Management Industry Overview

 The Telecom Operations Management Market is highly competitive and fragmented. This is due to the presence of significant players such as IBM Corporation, Oracle Corporation, Telefonaktiebolaget LM Ericsson, Hewlett Packard Enterprise Development LP, Nokia Corporation, etc. The prominent companies are entering into collaborations and are launching innovative solutions to increase their market share.

- February 2022 - Telecom Egypt and Grid Telecom have signed a strategic MoU for new subsea cable options between Greece and Egypt. The two companies will explore connectivity options between Greece and Egypt, as well as the use of Telecom Egypt's and Grid Telecom's networks and international footprint through interconnectivity to neighboring countries.
- September 2021 - Vodafone in Oman has signed an agreement with Ericsson to deploy, operate and maintain a new 4G and 5G core and radio access (RAN) greenfield network. Ericsson will supply a complete core network solution based on Ericsson Cloud Core, Cloud VoLTE, and NFVI, as well as an end-to-end transport network solution.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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