

Enterprise Communication Infrastructure - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Enterprise Communication Infrastructure Market size is estimated at USD 111.84 billion in 2025, and is expected to reach USD 252.09 billion by 2030, at a CAGR of 17.65% during the forecast period (2025-2030).

The rising need to upgrade outdated IT communication infrastructure drives organizations to invest in the enterprise communication infrastructure market.

The primary driver behind the investments in the enterprise communication infrastructure market has been the continuous evolution and application of new and advanced communication technologies. Moreover, the growing demand for advanced collaboration tools, the rising adoption of cloud-based communication solutions, and the increasing emphasis on digital transformation are estimated to drive the market growth opportunities considerably.

Also, the growing smartphone penetration rate, owing to the rising BYOD policies worldwide, is expected to provide immense growth opportunities for the enterprise communication infrastructure market during the forecast period.

The adoption of cloud services also continues to influence enterprise spending. Cloud-based solutions are also helping organizations create a more effective unified platform for internal and external communication. The growing adoption of cloud services, especially among SMEs, promotes further market development.

In September 2023, Ericsson declared a key milestone in the company's strategy to build a global network platform business with network APIs. Ericsson and Deutsche Telekom (DT) introduced a commercial partnership to provide communication and network APIs to enterprises and developers. Creating a global platform to expose advanced 5G capabilities, including quality on demand,

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latency, speed, and location through easy-to-consume network APIs, is one of the significant components of Ericsson's enterprise strategy. This would enable developers and enterprises to combine network features into their applications, enhancing enterprise digitalization and building new ways for operators to monetize their overall network investments.

However, the growing data security concerns and poor IT infrastructure, especially in developing regions, are some factors that can restrain the market growth during the forecast period.

Enterprise Communication Infrastructure Market Trends

The Retail Segment has a Significant Share in the Market

- The surge in adoption of various cloud-based solutions by organizations and companies plays a significant role in augmenting the market's growth opportunities since it offers flexible and scalable solutions. Cloud-based communication services allow organizations to simplify operations, enhance collaboration, and minimize costs. This shift enables organizations to leverage advanced communication tools without needing extensive on-premise infrastructures.
- The enterprise cloud communications systems have become more flexible and affordable, shifting away from inflexible and costly on-premise communications solutions. Hence, with modern communications services, companies can scale their overall infrastructure up or down as required without needing expensive hardware or maintenance. The different functions associated with enterprise cloud communication systems help businesses easily connect with anyone across the globe. The ability to work from anywhere, on any device, has also become necessary for companies to stay competitive, driving the market's growth opportunities significantly.
- In March 2023, Bandwidth Inc., a worldwide enterprise cloud communications company, introduced Bandwidth Maestro. This next-generation cloud communications platform mainly allows chief information officers to solve the significant challenge of integrating best-in-class real-time voice apps throughout their unified communications, cloud contact center, and artificial intelligence platforms, thereby resulting in faster time-to-value and improved employee and customer experiences. With Bandwidth Maestro, enterprises can easily customize global communications workflows and enhance state-of-the-art CX and AI capabilities like machine-learning-based fraud detection, conversational AI, and text-to-speech and speech-to-text tools, all interoperable and consumable by software.
- In February 2023, a cloud communication company, MyOperator, introduced Heyo Phone, a digital phone line for small and medium businesses. The digital phone connection can help small and medium-sized businesses manage customer interactions and improve their overall customer call and WhatsApp chat experience through a single business number.
- According to Flexera 2023 State of the Cloud Report 2024, around 49% of respondents run significant workloads on Amazon Web Services (AWS). This usage is expected to exponentially enable the market to witness substantial growth opportunities during the forecast period.

North America to Hold the Largest Market Share

- North America is anticipated to dominate the global enterprise communication infrastructure market. It is also because most of the major players in the market are US-based and are one of the early adopters of the technology. Also, cloud adoption among the regional end users is high, providing further growth opportunities to the market landscape.
- Many market vendors in the region also invest in innovating additional and unique features to their offerings to gain a competitive advantage and expand their customer target base. The overall competitive rivalry in the market is high, with various established and new market players entering this space. Industry players resort to various strategies to stay competitive, further boosting market growth opportunities.

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- For instance, in June 2023, Bandwidth Inc., a worldwide cloud communications company, and Miratech, a global IT services and consulting company, signed a strategic collaboration to augment digital customer experience transformation for global enterprises. Miratech and Bandwidth actively engage with various multi-country enterprise customer opportunities in a co-selling motion. The partnership would allow the Global 2000 enterprises to integrate their overall back-end environment with customer-facing teams, which is critical to enhancing greater brand engagement and loyalty.
- Also, in September 2023, Ericsson extended its partnership with Google Cloud to build an Ericsson Cloud RAN solution on Google Distributed Cloud that delivers integrated orchestration and automation and leverages AI/ML for various additional communications service provider benefits. Utilizing Ericsson Cloud RAN on GDC Edge allows the delivery of a completely automated and very large-scale distributed cloud, resulting in a reliable, efficient, highly performant, and secured software-centric radio access network infrastructure.

Enterprise Communication Infrastructure Industry Overview

The enterprise communication infrastructure market is highly fragmented due to the presence of many players. Some of the key players in the market include Cisco, IBM, and Microsoft. Some key recent developments in the market include:

- May 2024: Tata Communications, a prominent global communications technology firm, and Cisco, a leading global technology giant, strengthened their partnership. Their joint venture introduces a pioneering service in India: Webex Calling by Tata Communications. This innovative offering integrates Cisco's Webex Calling with Tata Communications' cloud voice services from the GlobalRapid platform, which are specifically customized for Indian enterprises.
- November 2023: Alianza Inc., a cloud communications platform for service providers, entered a multi-year strategic collaboration agreement with Amazon Web Services to transform how communication service providers monetize and deliver voice and cloud communications services. The solution is mainly available in North America and has already been deployed by over 100 communication service providers, including Tier-1 and nationwide operators Brightspeed, Lumen, Xplore, Bluepeak, and Viasat.
- July 2023: Alcatel-Lucent Enterprise, a provider of communications, networking, and cloud solutions tailored to customers' industries, introduced Alcatel-Lucent Enterprise Rainbow Hub in the United Kingdom. It merges its unified communications and PBX solutions into an entirely cloud-based service. The comprehensive, unified communications as a service solution (UCaaS) allows end users to leverage the key benefits of a cloud-based platform while enabling channel partners to provide advanced services.

Additional Benefits:

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

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