

## **Telecom Service Assurance - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

Market Report | 2026-02-09 | 134 pages | Mordor Intelligence

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### **Report description:**

Telecom Service Assurance Market Analysis

The telecom service assurance market was valued at USD 12.25 billion in 2025 and estimated to grow from USD 13.46 billion in 2026 to reach USD 21.58 billion by 2031, at a CAGR of 9.88% during the forecast period (2026-2031). Heightened performance-monitoring needs, 5G standalone adoption, and AI-centric zero-touch operations have boosted near-term spending as operators transition from reactive to proactive network management paradigms. Private-network and IoT vertical use cases are widening the addressable base, while hyperscaler partnerships are redirecting assurance architectures toward cloud-native, open-API designs. Competitive intensity has remained moderate; large multinationals are consolidating adjacent capabilities through acquisitions to strengthen end-to-end portfolios. North America continued to dominate in 2025, yet Asia Pacific's swift 5G rollout and enterprise digitalization yielded the fastest regional growth. Multiplying compliance mandates-from STIR/SHAKEN to the EU AI Act-have further entrenched the telecom service assurance market as a mission-critical spend category.

Global Telecom Service Assurance Market Trends and Insights

AI-centric Zero-touch Operations Adoption

Widespread automation initiatives reshaped network operations in 2024-2025 as operators pursued TM Forum Level 4-5 autonomy to curb operating expenses and sharpen service quality. Ericsson's joint work with AWS on Agentic AI proved that intent-based orchestration can cut manual interventions and lift customer satisfaction. TM Forum economic modelling estimated

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average annual savings of USD 800 million per tier-1 operator once AI-driven closed-loop control matures. Eighty-seven percent of global carriers had at least one production AI use case by late-2024, yet half cited fragmented data collection as the top barrier, spurring demand for unified assurance data lakes. Regulators added momentum: the EU AI Act requires transparent and auditable models, strengthening procurement criteria for assurance platforms that embed explainability. These forces collectively enlarged spending allocations to AI-native assurance modules, reinforcing growth in the telecom service assurance market.

#### 5G SA Roll-out Demanding Real-time SLA Visibility

Commercial 5G standalone networks ran at scale in North America, Europe, and key Asia Pacific markets during 2024, triggering unprecedented resiliency requirements. NETSCOUT released virtual tap technology to ingest 100 Gbps traffic streams for microsecond-level analytics across cloudified cores. Spirent's active-assurance probes generated synthetic traffic to validate slice performance before customer impact, reversing long-standing reactive operating models. Service providers prioritized slice-aware analytics that tie transport, core, and RAN metrics into unified dashboards, a gap that traditional OSS/BSS could not cover. Standards groups TM Forum and 3GPP finalized slice-specific KPIs, propelling vendors to embed them natively. Heightened enterprise SLA expectations-especially for robotics and AR-further elevated real-time assurance from an optional feature to a contractual necessity.

#### Capex Freezes by Tier-1 MNOs 2024-25

Carrier capex contracted sharply in 2024 as 5G radio builds peaked and macroeconomic uncertainty rose. Dell'Oro's tracking placed industry capex 8% lower year-over-year, with projections for a 2% CAGR decline through 2027. Large United States operators reduced infrastructure outlays by roughly 50% versus prior budgets, delaying non-essential software expansions. Assurance vendors faced extended sales cycles and heightened ROI scrutiny; however, they leveraged cost-savings narratives-predictive maintenance and energy optimization-to remain on procurement short lists. Analysts expect budgets to thaw in late-2025 once 5G monetization initiatives mature, positioning assurance spending to rebound alongside renewed RAN densification.

Other drivers and restraints analyzed in the detailed report include:

Compliance Pressure (STIR/SHAKEN, GDPR, EU AI Act)Telco API Monetization Needs End-to-end QualityLegacy OSS/BSS Integration Complexity

For complete list of drivers and restraints, kindly check the Table Of Contents.

#### Segment Analysis

Performance Monitoring and Analytics captured 34.78% revenue in 2025, underpinning every major network-modernization program. The segment's high share reflected urgent needs to visualize radio, transport, and core domains in real time. Cisco's AI-augmented telemetry streams exemplified how operators pivoted from threshold-based alarms to predictive analytics that pre-empt congestion. The telecom service assurance market size tied to Performance Monitoring is projected to maintain a robust mid-single-digit CAGR as slice-aware metrics expand.

Automated Root-Cause and Remediation rose as the high-growth niche, forecast at 11.02% CAGR through 2031, propelled by TM Forum Level-4 autonomy targets. Carriers demanded closed-loop feedback that self-heals degraded slices within seconds, slashing MTTR by up to 60%. Vendors bundled machine-learning policy engines that correlate billions of events and recommend remediation scripts, compressing troubleshooting head-counts. Over 30 global operators issued RFPs for root-cause AI modules during 2025, signaling a maturation path from pilot to mainstream adoption.

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On-premises platforms still held 50.62% share in 2025 as operators sought tight control over sensitive core data. However, cloud-native instances of telecom service assurance market solutions expanded 12.08% annually, enabled by containerization and CI/CD pipelines. Red Hat's Kubernetes-based OSS reference stack showcased cost benefits from elastic scaling and managed services. Simultaneously, Infovista's KLERITY delivered vendor-agnostic assurance with multi-tenancy to serve enterprise customers in SaaS mode.

Hybrid mode is emerging as the default architecture: heavy packet brokering and lawful-intercept workloads remain on-premises, while AI training and long-term analytics shift to public clouds. This duality addresses data-sovereignty directives yet harnesses hyperscaler GPUs for model training. The telecom service assurance market size for hybrid architectures is forecast at USD 10.29 billion by 2031, advancing on par with overall market CAGR.

The Telecom Service Assurance Market Report is Segmented by Solution Type (Fault and Event Management, Performance Monitoring and Analytics, and More), Deployment Mode (On-Premises, Cloud-Native, and Hybrid), Operator Type (Mobile Network Operators, Fixed and Cable Operators, and More), Application Domain (5G RAN Assurance, Core and Edge Assurance, and More), and Geography. The Market Forecasts are Provided in Terms of Value (USD).

### Geography Analysis

North America sustained 31.88% share in 2025, fueled by STIR/SHAKEN compliance deadlines and early standalone-core commercialization. Operators such as AT&T and Verizon piloted Level-4 energy-optimization use cases that trimmed cell-site power by 5%. Integration with AWS and Google Cloud advanced the regional shift toward assurance-as-code pipelines. The telecom service assurance market size tied to North America is projected at USD 7.18 billion by 2031, maintaining mid-single-digit growth as private-5G initiatives scale.

Asia Pacific rose as the primary growth engine, logging a 12.12% CAGR through 2031 on the back of nationwide 5G coverage in India, Thailand, and Australia. Fitch Ratings affirmed stable credit metrics for many Asia-Pacific telcos, enabling sustained investments in assurance modernization. Enterprise 5G and massive IoT deployments across manufacturing corridors spurred demand for slice-aware and device-centric monitoring, doubling average deal sizes compared with LTE-era contracts.

Europe retained significant opportunity, balancing GDPR and impending EU AI Act compliance burdens with open-RAN diversification. Operators sought vendor-neutral dashboards that reconcile multiple RU/DU suppliers, elevating the appeal of disaggregated assurance. Middle East and Africa gained traction through Comarch's multi-domain OSS rollouts, which align with government digital-economy blueprints. Latin America approached the tipping point for 5G dominance, with GSMA projecting 60% 5G penetration by 2030. This transition necessitates cloud-hosted assurance to offset constrained capex budgets.

List of Companies Covered in this Report:

ASM Global Informa PLC Messe Frankfurt GmbH Reed Exhibitions (RX Global) Maritz Global Events Inc. MCI Group Cvent Holding Corp. GL Events SA Comexposium Fiera Milano SpA Koelnmesse GmbH Tarsus Group SMG (merged into ASM Global) Clarion Events Ltd. Viad Corp (GES) Emerald Holding Inc. Hyve Group plc dmg events Freeman Company Itochu Corp (Congrex)

Additional Benefits:

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

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