|        |   |                     |        |        |         |           |               | 77.077            | /   |
|--------|---|---------------------|--------|--------|---------|-----------|---------------|-------------------|-----|
|        |   | • analysys<br>mason |        |        |         | 68.769    | 43.009        | 10.246            | 10  |
| 89,090 | - mason   |                     |        |        | 70.501  | 89.090    | 50.767        | 57.953            | 78  |
| 70,501 | Service design and<br>orchestration: worldwide<br>market shares 2021<br>Alex Bilyi and Justin van der Lande |                     |        |        | 12.678  | 70.501    | 45.778<br>百古日 | 53.221            | 13  |
| 12.678 |   |                     |        |        | 10.453, | ↓12.678 7 | 320 <u></u> 9 | 78.909            | 24  |
| 10,453 |   |                     |        |        | 15.789  | 10.453    | 60.555        | T <b>1</b> 34.666 | T Q |
|        |   |                     |        |        | 34.467  | 15.789    | 78.544        | 33.212            | 77  |
|        | 15.789  | 78.544              | 33.212 | 77.313 | 89.090  | 34.467    | 80.555        | 21.456            |     |
| /      |   |                     |        |        |         |           |               |                   |     |
|        |   |                     |        |        |         |           |               |                   |     |

# About this report

This report provides market share data for communications service provider (CSP) spending on telecoms-specific service design and orchestration (SDO) software systems and related services for 2021. It provides details of how the spending varied by delivery model, vendor and region. The report also includes profiles of the leading vendors in the market.

It is based on several sources, including:

- interviews with CSPs and vendors worldwide
- Analysys Mason's research conducted during the past year.



### **GEOGRAPHICAL COVERAGE**

- Worldwide
- Central and Eastern Europe
- Developed Asia–Pacific
- Emerging Asia Pacific
- Latin America
- Middle East and North Africa
- North America
- Sub-Saharan Africa
- Western Europe



## **KEY QUESTIONS ANSWERED IN THIS REPORT**

- What was the overall size of the market (service design and orchestration software systems for the telecoms industry) and what drove this spending among CSPs?
- Who are the major vendors and what is their share of revenue in the service design and orchestration systems market?
- What are the different drivers and growth rates of CSP spending on products and professional services?



# WHO SHOULD READ THIS REPORT

- Vendor strategy teams that need to understand the key areas of growth.
- Product management teams that are responsible for feature functionality and product marketing teams that are responsible for market share growth.
- Market intelligence teams at vendors that want to understand how their competitors compare with each other.
- CSPs that are planning digital transformation journeys and want to ensure that their current vendors are staying up to date.



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Vendor analysis

Market definition

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# Our research programmes



#### Consumer Services programmes

Fixed Broadband Services Mobile Services Fixed-Mobile Convergence Smart Devices Future Comms Video, Gaming and Entertainment Digital Services



### Networks programmes

Next-Generation Wireless Networks Wireless Infrastructure Strategies Fibre Infrastructure Strategies Operator Investment Strategies Telecoms Strategy and Forecast

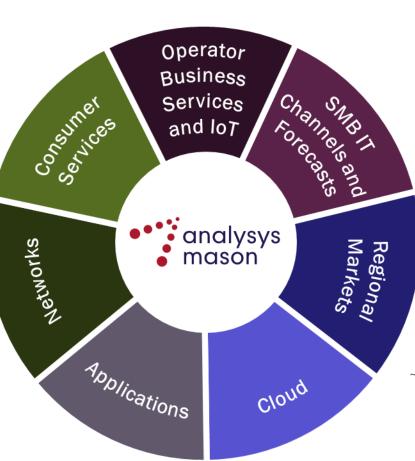


Applications programmes Network Automation and Orchestration Customer Engagement Monetisation Platforms Digital Experience Automated Assurance Service Design and Orchestration Telecoms Software Market Shares



### **Cloud programmes**

Cloud Infrastructure Strategies Data, AI and Development Platforms Edge and Media Platforms



analysysmason.com/what-we-do/practices/research



Operator Business Services and IoT programmes

> Enterprise Services SME Services IoT Services Private Networks



# Regional Markets programmes

Global Telecoms Data and Financial KPIs Americas Asia-Pacific Middle East and Africa European Core Forecasts European Telecoms Market Matrix European Country Reports

DataHub

~2800 forecast and 280+ historical metrics Regional results and worldwide totals Operator historical data





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