



Automated assurance: worldwide forecast 2022– 2027



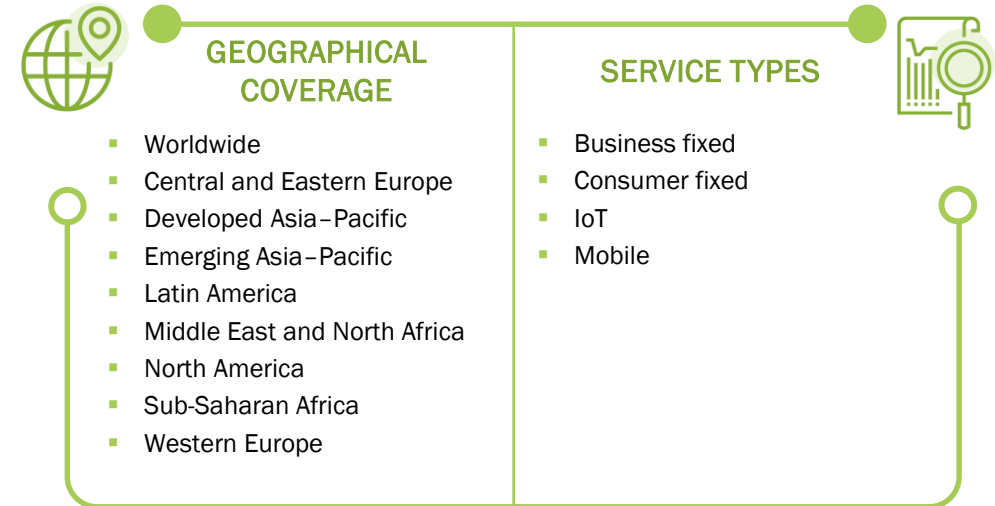
Dennisa Nichiforov and Justin van der Lande

About this report

This report provides forecasts for communications service provider (CSP) spending on automated assurance and related services for 2022–2027. It provides details on spending by delivery model, service type and region, as well as the major drivers, including 5G. The report also provides recommendations for vendors and CSPs.

The report is based on several sources, including:

- Analysys Mason’s research from the past year
- interviews with CSPs and vendors worldwide.



KEY QUESTIONS ANSWERED IN THIS REPORT

- What are the key trends and factors that will affect the automated assurance market during 2022–2027?
- What are the regional factors that will drive growth?
- What should vendors do to exploit new business opportunities?
- How will professional services for automated assurance perform during the forecast period?

WHO SHOULD READ THIS REPORT

- Vendor strategy teams that need to understand how CSPs’ investments are shifting.
- Product management teams that are responsible for feature functionality and geographical focus, and product marketing teams that are responsible for growth.
- Professional services vendors that want to understand the growth opportunities over the next 5 years.
- CSPs that are planning digital transformation journeys and want to understand the key areas that they should focus on.

Three key drivers of spending expected for this segment during 2022–2027

1

The complexity of new 5G architecture will increase the demand for assurance over multiple technologies and domains

5G-related spending on automated assurance (AA) will reach USD4.1 billion worldwide by 2027 and will account for 50% of all AA spending. New and evolved assurance technology will be deployed and will span multiple technologies and domains (including the virtual disaggregated RAN, distributed edge and cloud-native core). Such technology will become an integral component of CSPs' 5G strategies.

2

Intelligent automation will be a key driver of spending in the assurance market to streamline operations and automate assurance processes

CSPs will require significant levels of operational automation as they begin to transition to 5G SA. Network management automation will become a priority, and the emergence of closed-loop automation will drive the seamless integration of orchestration and assurance that will aid the transition from guided automation to zero-touch automation over time.

3

Network analytics and the adoption of AI/ML will be central to the implementation of automation for 5G service delivery

The complexity of 5G networks will drive the need for monitoring and assurance across all layers and domains (which means that a plethora of data sources will be used). The adoption of AI/ML will be key to tracking network changes and correlating multiple network data sources (both historical and real-time streaming data) to predict degradations in service and network performance and automate mitigation and remediation procedures.



Executive summary and recommendations

Forecast

Overall telecoms market context

Market definition

About the authors and Analysys Mason

About the authors



Dennisa Nichiforov (Senior Analyst) leads Analysys Mason's *Automated Assurance* research programme, which is part of the Applications practice. Her research focuses on the impact of emerging technologies (such as network function virtualisation (NFV), software-defined networking (SDN), cloud, 5G and IoT) on service assurance, the new demands around extreme automation and the opportunities and threats for the vendor ecosystem. Dennisa holds a BSc in environmental economics from the Academy of Economic Studies in Bucharest and an MA in logistics and supply chain management from the University of Greenwich.



Justin van der Lande (Research Director) leads the Applications practice, which is part of Analysys Mason's Telecoms Software and Networks research stream. He specialises in business intelligence and analytics tools, which are used in all telecoms business processes and systems. In addition, Justin provides technical expertise for Analysys Mason in consultancy and bespoke large-scale custom research projects. He has more than 20 years' experience in the communications industry in software development, marketing and research. He has held senior positions at NCR/AT&T, Micromuse (IBM), Granite Systems (Telcordia) and at the TM Forum. Justin holds a BSc in Management Science and Computer Studies from the University of Wales.

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 - Cyber Security
- 
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 - Americas
 - Asia-Pacific
 - Middle East and Africa
 - European Core Forecasts
 - European Telecoms Market Matrix
 - European Country Reports
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DataHub
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Our areas of expertise



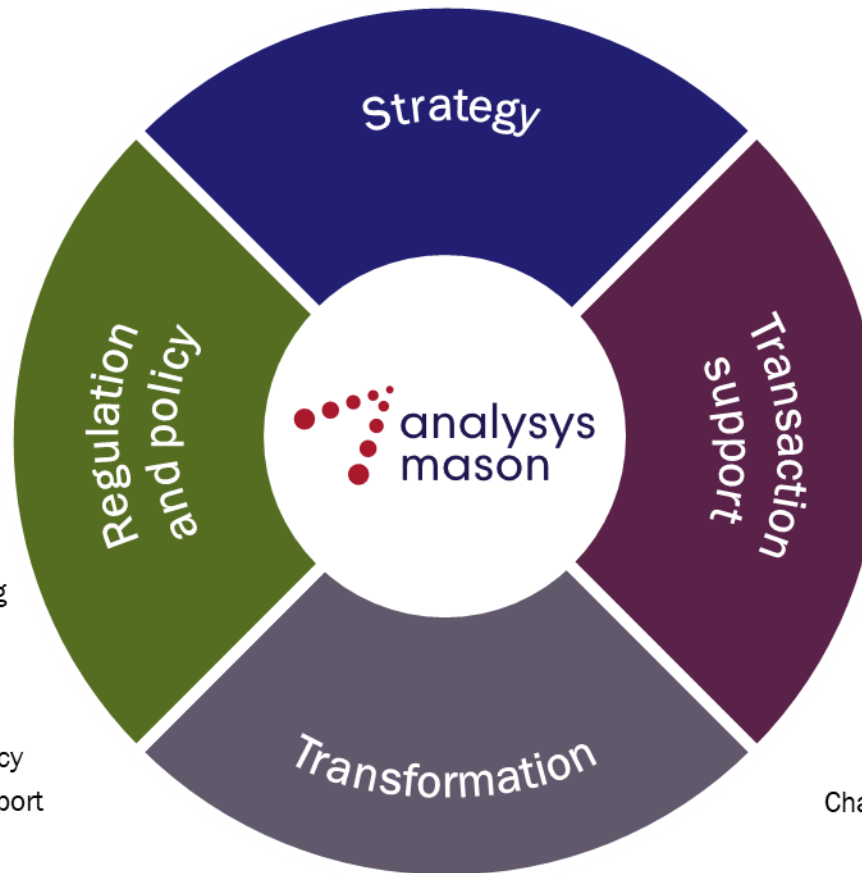
Strategy

- Corporate growth strategy
- Business unit strategy
- Infrastructure strategy



Regulation and policy

- Network and platform
- Public sector broadband intervention
- Accelerating digital transformation of society
- Price controls and cost modelling
- Regulatory accounting
- Regulatory benchmarking and analysis
- Spectrum management and policy
- Expert witness and litigation support
- Postal regulation and policy



Transaction support

- Commercial due diligence and market review
- Technical due diligence
- Post-merger integration
- Periodical business monitoring and loan technical advisory
- Opportunity scouting and pre-deal support



Transformation

- Business transformation
- Digitalisation
- Operational excellence
- Data, BI, steering and insights
- Change and programme management
- Sustainability



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