

About this report

This report provides market share data for communications service provider (CSP) spending on telecoms-specific network automation and orchestration (NAO) 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.

KEY QUESTIONS ANSWERED IN THIS REPORT

- What was the overall size of the market (NAO software systems for the telecoms industry) and what drove this spending among CSPs?
- What were the early investment trends in 2021 that are likely to make a big impact in the next few years?
- Who are the major vendors and what is their share of revenue in the NAO software systems market?
- What are the different drivers and growth rates of CSP spending on products and professional services?



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



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.



Contents



Executive summary

Market shares





Overall telecoms market context

Vendor analysis





Market definition

About the authors and Analysys Mason

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



- 
Operator Business Services and IoT programmes
 - Enterprise Services
 - SME Services
 - IoT Services
 - Private Networks
- 
SMB IT Channels and Forecasts programmes
 - Cyber Security
- 
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

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

PUBLISHED BY ANALYSYS MASON LIMITED IN JULY 2022

Analysys Mason Limited. Registered in England and Wales with company number 05177472. Registered office: North West Wing Bush House, Aldwych, London, England, WC2B 4PJ.

We have used reasonable care and skill to prepare this publication and are not responsible for any errors or omissions, or for the results obtained from the use of this publication. The opinions expressed are those of the authors only. All information is provided "as is", with no guarantee of completeness or accuracy, and without warranty of any kind, express or implied, including, but not limited to warranties of performance, merchantability and fitness for a particular purpose. In no event will we be liable to you or any third party for any decision made or action taken in reliance on the information, including but not limited to investment decisions, or for any loss (including consequential, special or similar losses), even if advised of the possibility of such losses.

We reserve the rights to all intellectual property in this publication. This publication, or any part of it, may not be reproduced, redistributed or republished without our prior written consent, nor may any reference be made to Analysys Mason in a regulatory statement or prospectus on the basis of this publication without our prior written consent.

© Analysys Mason Limited and/or its group companies 2022.