								77.077	
100	•••analysys • mason				89.090	68.769	43.009	10.246	10
9.090			•	mason	70.501	89.090	50.767	57.953	78
0.501	OSS/BSS software and				12.678	70.501	45.778 百古 1	53.221	13
2.678	service	services: worldwide market shares 2021			10.453	12.678 10.453	32099. 60.555	78.909	24
	Justin van der Lande, John Abraham, Dennisa Nichiforov, Michelle Lam, Raúl Simmons Pérez and Alex Bilyi				34.467	15.789	78.544	33.212	777
	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 OSS/BSS software systems and related services for 2021. It provides details of how the spending varied by delivery model, vendor and region.

It is based on several sources, including:

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



- 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

SEGMENT COVERAGE



- Automated assurance
- Customer engagement
- Monetisation platforms
- Network automation and orchestration
- Service design and orchestration



KEY QUESTIONS ANSWERED IN THIS REPORT

- What was the overall size of the market (OSS/BSS software and services 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 OSS/BSS software market?
- What are the different drivers and growth rates of CSP spending on products and professional services?



WHO SHOULD READ THIS REPORT

- Vendor and systems integrator strategy teams that need to understand where growth is slowing and where it is increasing across different market segments.
- Product management teams that are responsible for feature functionality, geographical focus or professional service offerings, and product marketing teams that are responsible for market-share growth.
- Market intelligence teams at vendors that want to understand how their competitors compare to each other.

This document is for Analysys Mason's subscription service customers only. Usage is subject to the terms and conditions in our copyright notice.



Contents

• • • • • • • • • • • • • • •

Executive summary

Overall market shares

Market shares by segment

Overall telecoms market context

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 Transport Network Strategies



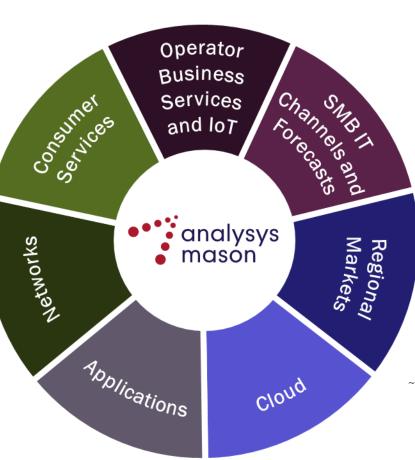
Applications programmes

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 Multi-Cloud Networking



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



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





PUBLISHED BY ANALYSYS MASON LIMITED IN OCTOBER 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.