



Telecoms transport network survey: operator investment priorities



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About this report

This report presents the results of a survey of operators on their telecoms transport networks challenges, priorities and investment plans.

It provides insights into:

- The factors that are causing, or likely to cause disruption within operator transport networks.
- Operators' short and medium-term investment priorities.
- Operator expectations for the deployment of a range of specific technologies within their transport networks.
- Operators' plans for convergence.
- Operators' future transport network capex and opex expectations.

The survey was conducted in 1Q and 2Q 2023. 36 operators responded from around the world, particularly in Asia-Pacific, Europe and North America. The respondents were from operators' CTO teams and the respondents were heavily weighted towards larger operators.

It is important to note that all but one of the operators responding to the survey operate LTE or 5G networks.



KEY QUESTIONS ANSWERED IN THIS REPORT

- Which trends are posing challenges within operators' transport networks?
- What are the anticipated challenges that transport network operators expect to encounter in the future?
- Which areas of the transport network need upgrades?
- Where are operators planning to focus their investment activities?
- Which technologies are transport network operators planning to deploy?
- How do operators expect their transport capex and opex to evolve?



WHO SHOULD READ THIS REPORT

- Strategy, product marketing and marketing executives within transport network vendors, who need to understand their customers' challenges, and how they plan to invest in response to those challenges.
- Strategy and planning executives within telecoms or wholesale transport network operators, who need to understand how their plans compare with those of their peers.



Executive summary

Transport network challenges

Operator priorities

Technology investment plans

Survey questions and panel information

Glossary

About the author and Analysys Mason

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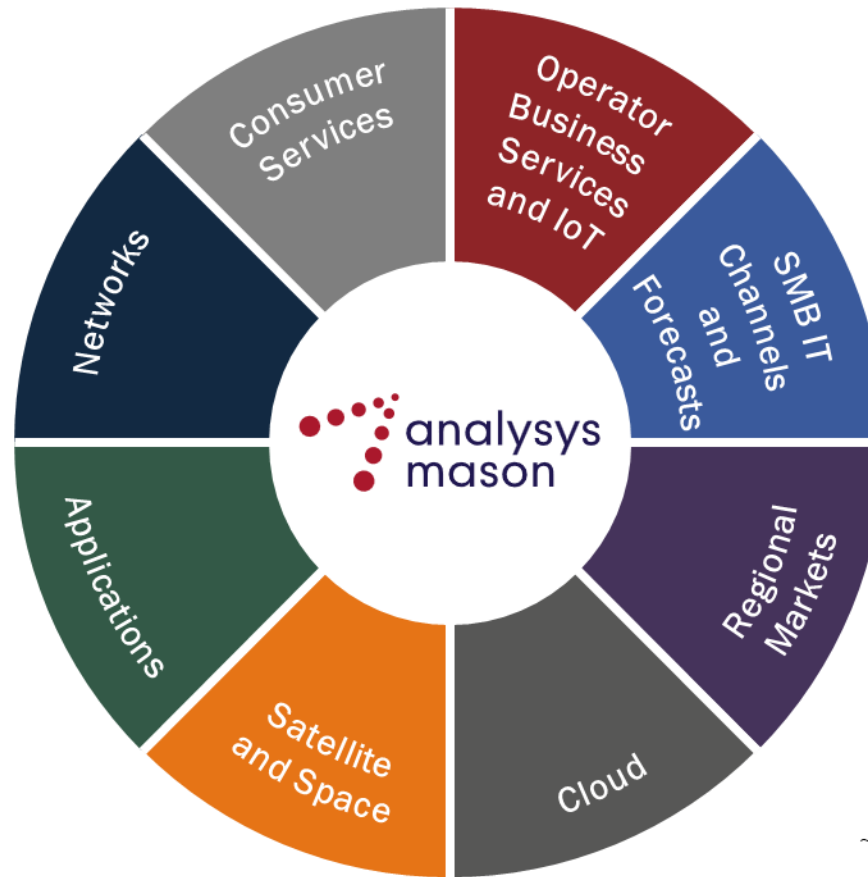
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 Automated Assurance
 Service Design and Orchestration
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 Satellite Communications
 Space Applications and Infrastructure



Operator Business Services and IoT

- Enterprise Services
- SME Services
- IoT Services
- Private Networks



SMB IT Channels and Forecasts

- Cyber Security
- SMB Technology Forecaster



Regional Markets

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



Cloud

- Cloud Infrastructure Strategies
- Data, AI and Development Platforms
- Edge and Media Platforms
- Multi-Cloud Networking



DataHub

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



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Our areas of expertise



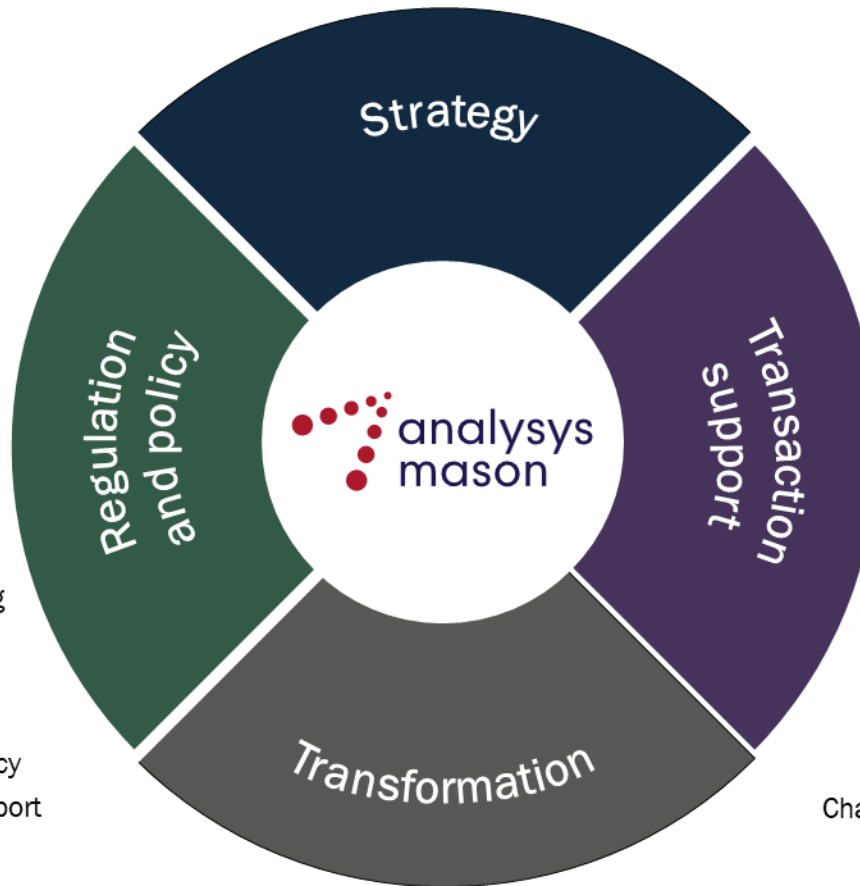
Strategy

- 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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