

# Transport networks: a technology and investment framework



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## About this report

This report analyses the telecoms transport networks market, and introduces a technology taxonomy, a map of the ecosystem and the key investors. This will establish a framework for our future research and analysis.

The transport networks market is changing and being disrupted in response to new broadband demand patterns and new network architecture. We forecast that operator spending on transport networks will reach USD41.5 billion in 2023 and TCO will be USD54 billion. The vendors that are successful in this growing market, will be those that identify the biggest growth segments while understanding how spending will shift to new players and business models.

This report will help vendors and investors to understand these developments by establishing a research framework that sets out the taxonomy of this market and its ecosystem. The framework focuses on specific trends and technology categories, and will provide the structure for future forecasts and strategy analysis.

It is based on several sources:

- Analysys Mason's internal research, including capex and opex forecasts and total addressable market forecasts
- surveys and interviews with 78 transport network deployers
- interviews with other stakeholders including vendors and regulators.

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### KEY QUESTIONS ANSWERED IN THIS REPORT

- How is the transport networks market structured and where are the biggest areas of spending growth?
- How will deployment and ownership of transport networks change in the period to 2027?
- How will the increasing capacity demands affect transport network architecture and product requirements?
- How will network convergence drive changes in transport architecture and operating models?
- How will the 5G xHaul market evolve in the period to 2027?



### WHO SHOULD READ THIS REPORT

- Strategy, product marketing and marketing executives within transport network vendors, who need to understand changes in spending patterns and customer requirements.
- Strategy and planning executives within telecoms or wholesale transport network operators, who need to understand how their business model aligns with broader trends.
- Executives responsible for infrastructure investment strategies within financial institutions, development organisations or infrastructure owners, who need to understand the most promising partnerships and investment opportunities.



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Convergence drives new scale and architecture

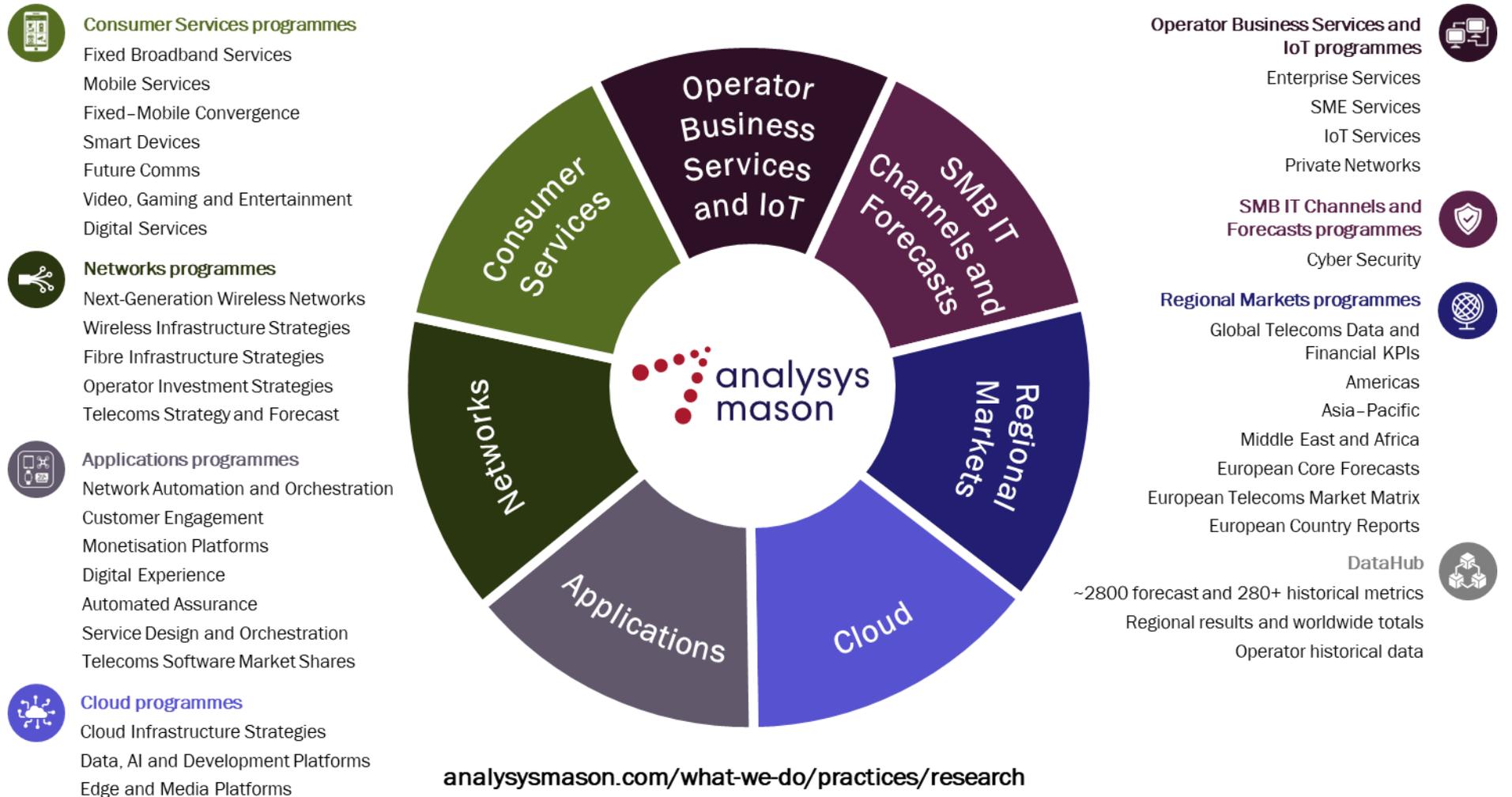
5G vRAN is creating a high-growth xHaul market

New investors will change the structure of the transport market

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# Our research programmes



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