

Global Telecom Operations Management Market Size study & Forecast, by Service Type (Managed Services, Operations And Maintenance), by Software Type (Resource Inventory Management, Billing And Revenue Management), by Deployment Model (Cloud-based, On-premise) and Regional Forecasts 2025-2035

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Abstracts

The Global Telecom Operations Management Market is valued approximately at USD 46 billion in 2024 and is anticipated to grow with a CAGR of more than 9.50% over the forecast period 2025-2035. Telecom operations management refers to a set of solutions and services that enable operators to streamline workflows, optimize resources, and ensure seamless service delivery across complex communication networks. These systems are vital for enhancing customer experience, reducing churn, and ensuring revenue assurance in an industry that is constantly evolving with 5G, IoT, and digital transformation initiatives. The surge in mobile subscribers, skyrocketing demand for high-speed internet, and increasing reliance on cloud-based platforms are compelling telecom operators to deploy advanced operations management solutions to ensure efficiency, scalability, and agility. The rapid digital shift of enterprises and the need for telcos to reduce operational costs further drive the market outlook.

The continuous expansion of telecom infrastructure has created an urgent demand for robust operational management frameworks that can handle rising network complexities. These solutions are not only vital for managing service quality and network performance but also for ensuring real-time billing, fraud management, and revenue optimization. According to the International Telecommunication Union (ITU), the number of internet users worldwide surpassed 5.4 billion in 2023, highlighting the exponential growth in data consumption and service expectations. Additionally, the

emergence of 5G technology and increasing adoption of edge computing present tremendous opportunities for the telecom operations management market. Nevertheless, high implementation costs and data security concerns remain challenges that may restrict wider adoption, especially among small-scale operators in emerging markets.

The detailed segments and sub-segments included in the report are:

By Service Type:

Managed Services

Operations and Maintenance

By Software Type:

Resource Inventory Management

Billing and Revenue Management

By Deployment Model:

Cloud-based

On-premise

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Managed Services are Expected to Dominate the Market

Managed services are anticipated to dominate the telecom operations management landscape, capturing the largest market share during the forecast period. This growth is attributed to the increasing complexity of telecom ecosystems that demand outsourcing of operational functions to specialized service providers. Telcos are progressively leveraging managed services to reduce costs, enhance efficiency, and free up resources for innovation in areas like 5G deployment and IoT enablement. Operations and maintenance services, though critical, are expected to witness more moderate growth, given that managed service providers increasingly bundle them into comprehensive solutions. Managed services, therefore, remain the primary growth engine within the sector.

Billing and Revenue Management Lead in Revenue Contribution

Among the software segments, billing and revenue management hold the lion's share of revenue contribution. Telecom operators prioritize this segment as it directly impacts profitability through accurate billing, fraud detection, and revenue assurance. With growing customer bases and complex service offerings, revenue management systems have become indispensable in preventing revenue leakage and improving financial efficiency. While billing dominates in terms of revenue share, resource inventory management is forecasted to grow at a rapid pace, driven by the rising need for real-time resource allocation and optimized utilization in next-generation telecom networks. Together, they form the backbone of efficient telecom operations management, but billing and revenue management remain the cornerstone of financial sustainability.

The key regions considered for the Global Telecom Operations Management Market study include Asia Pacific, North America, Europe, Latin America, and the Middle East & Africa. North America currently dominates the market, largely due to its well-established telecom infrastructure, rapid adoption of 5G technology, and strong presence of leading telecom operators and technology vendors. The region's focus on customer-centric strategies and automation tools to improve service quality has further

strengthened its leadership. Asia Pacific, on the other hand, is expected to emerge as the fastest-growing region during the forecast period. The surge in smartphone penetration, exponential rise in data consumption, and government-backed initiatives for digital transformation in countries such as China and India are accelerating demand. Europe continues to remain a significant contributor as telecom providers invest heavily in upgrading networks and shifting toward advanced OSS/BSS platforms.

Major market players included in this report are:

Ericsson

Huawei Technologies Co., Ltd.

Nokia Corporation

IBM Corporation

Hewlett Packard Enterprise Development LP

Oracle Corporation

Accenture Plc

Cisco Systems, Inc.

Amdocs Limited

Tata Consultancy Services Limited

Netcracker Technology Corporation

SAP SE

Infosys Limited

Tech Mahindra Limited

Comarch SA

Global Telecom Operations Management Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period - 2025-2035

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent to up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segments of the market are explained below:

Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional-level analysis for each market segment.

Detailed analysis of the geographical landscape with country-level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of the competitive structure of the market.

Demand side and supply side analysis of the market.

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