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Minimum Efficient Scale in telecom infrastructure

https://marketpublishers.com/r/M3F5756A682AEN.html
Date: April 2026
Pages: 34
Price: US$ 7,700.00 (Single User License)
ID: M3F5756A682AEN

Abstracts

The telecom infrastructure industry is entering a new economic phase. While network architectures are becoming more modular and open, the capital intensity required to compete is increasing.

Disaggregation was expected to lower barriers to entry by enabling modular vendor participation and multi-vendor ecosystems. However, software-driven architectures, AI-enabled optimisation platforms, expanding security requirements, and local manufacturing pressures are raising the fixed-cost base of telecom vendors. As a result, Minimum Efficient Scale is rising across telecom infrastructure markets.

Vendor ecosystems are therefore likely to become more polarised, combining large-scale infrastructure vendors capable of sustaining heavy R&D investment with specialised niche players focused on differentiated technologies. Mid-tier vendors may face increasing pressure to consolidate or reposition.

This report analyses how rising capital intensity is reshaping vendor economics, industry structure, and competitive dynamics.

Key questions:

Is disaggregation lowering barriers to entry, or increasing the scale required to compete sustainably?

Which telecom infrastructure domains require the highest Minimum Efficient Scale?

How will rising capital intensity affect vendor consolidation and market structure between 2026 and 2030?

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What risks do rising scale requirements create for vendor diversity, innovation capacity, and operator ecosystems?

How should telecom infrastructure vendors position themselves strategically in response to rising MES thresholds?

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