

Communication Test and Measurement Market by Offering (Hardware, Software, Services), Test Solution, Type of Test (Enterprise Test, Field Network Test, Lab & Manufacturing Test, Network Assurance Test), End User and Region - Global Forecast to 2029

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Abstracts

MarketsandMarkets forecasts that the communication test and measurement market size is projected to grow from USD 9.6 billion in 2024 to USD 14.9 billion by 2029, at a CAGR of 9.1% during the forecast period. Regulatory standards and industry specifications require communication equipment to meet certain performance criteria and regulatory compliance. This drives the need for specialized test and measurement solutions that can ensure adherence to these standards.

“By services, the managed services segment is expected to grow with the highest CAGR during the forecast period.”

managed services offer organizations comprehensive solutions to assess, monitor, and enhance their communication strategies efficiently. These services provide access to specialized expertise and advanced technologies, enabling organizations to scale resources according to their needs while remaining cost-effective. By outsourcing these functions to managed service providers, organizations can focus on their core competencies while ensuring that communication initiatives are executed seamlessly. Managed services also mitigate risks associated with data security and compliance, thanks to stringent protocols and adherence to regulatory standards. This service relieves customers from wasting efforts, time, and money on the update, repair, and maintenance of test equipment and leverages the advanced communication test and measurement equipment available in the market at cheaper rates. The service providers and network equipment manufacturers are increasingly opting for managed services to

reduce their capital expenditure (CAPEX) and operational expenditure (OPEX).

“By services, the professional services segment is expected to hold the largest market size during the forecast period.”

Professional services act as indispensable partners, offering tailored solutions to enhance organizational communication effectiveness. These services encompass a spectrum of offerings, including consultation, strategy development, tool implementation, data analysis, training, quality assurance, and continuous improvement. Professional service providers collaborate closely with organizations to assess communication needs, devise strategic plans, implement measurement tools, analyze data, and ensure adherence to best practices. These services assist network equipment manufacturers and service providers in testing new services, qualifying, and characterizing the network design, thereby significantly reducing the costs, complexity, and time-to-market. Professional services reduce the amount of time and effort taken by end users in developing optimal network infrastructure and enable them to focus on their core business objectives. This is the major reason for the adoption of professional services by industries.

“Asia Pacific is expected to grow with the highest CAGR during the forecast period.”

The communication test and measurement market in the Asia Pacific region is undergoing significant advancements and has witnessed the advanced and dynamic adoption of new technologies and is expected to record the highest CAGR in the communication test and measurement market during the forecast period. Asia Pacific countries are considerably contributing to the growth of the communication test and measurement market. The growing demand for automated electronic products has made the Asia Pacific market very attractive, but the growth is fragmented, and many local players have specialized contributions making the communication test and measurement ecosystem in Asia Pacific competitive.

Breakdown of primaries

The study contains insights from various industry experts, from solution vendors to Tier 1 companies. The break-up of the primaries is as follows:

By Company: Tier 1–35%, Tier 2–40%, and Tier 3–25%

By Designation: C-Level Executives–35, Director Level–25%, and Others–40%

By Region: North America–30%, Europe–35%, APAC–25%, RoW–10%

The major players in the communication test and measurement market are Anritsu (Japan), Fortive (US), EXFO (Canada), Rohde & Schwarz (Germany), Emerson (US), VIAVI Solutions (US), Yokogawa (Japan), Spirent Communications (UK), Keysight Technologies (US), Huawei (China), Hammer (US), Calnex Solutions (UK), Luna Innovations (US), NetScout (US), Cisco (US), LitePoint (US), SysMech (England), VeEX (US), TEOCO Corporation (US), NetAlly (US), thinkRF (Canada), Kyrio (US), Fastech Telecommunications (India), Eagle Photonics (India), Verkotan (Finland). These players have adopted various growth strategies, such as partnerships, agreements and collaborations, new product launches, product enhancements, and acquisitions to expand their footprint in the communication test and measurement market.

Research Coverage

The report segments the global communication test and measurement market based on offering has been classified into hardware, software, and services (professional services (support services, consulting services, training services), managed services)). Based on test solution, the market is classified into two segments, wireline test solution and wireless test solution. Based on type of test, the market is classified by enterprise test, field network test, lab & manufacturing test, and network assurance test. Based on end user, the market is segmented into telecommunication service provider, network equipment manufacturer, mobile device manufacturer, and other end users. By region, the market has been segmented into North America, Europe, Asia Pacific, Middle East & Africa, and Latin America.

Key benefits of the report

The report would help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall communication test and measurement market and the subsegments. This report would help stakeholders understand the competitive landscape and gain insights to better position their businesses and plan suitable go-to-market strategies. The report would help stakeholders understand the pulse of the market and provide them with information on the key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers (growing demand for network testing, rising demand for automated products and a growing need for communication test and measurement equipment, rapid technological advancements), restraints (price sensitivity, lack of standardization), opportunities (deployment of 5G networks, rising demand for bandwidth and traffic inspection, quantum communication testing), and challenges (matching up with continually changing technologies, security and privacy concerns).

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the communication test and measurement market.

Market Development: Comprehensive information about lucrative markets – the report analyses the communication test and measurement market across varied regions.

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the communication test and measurement market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players such as Anritsu (Japan), Fortive (US), EXFO (Canada), Rohde & Schwarz (Germany), Emerson (US), VIAVI Solutions (US), Yokogawa (Japan), Spirent Communications (UK), Keysight Technologies (US), Huawei (China), Hammer (US), Calnex Solutions (UK), Luna Innovations (US), NetScout (US), Cisco (US), LitePoint (US), SysMech (England), VeEX (US), TEOCO Corporation (US), NetAlly (US), thinkRF (Canada), Kyrio (US), Fastech Telecommunications (India), Eagle Photonics (India), Verkotan (Finland).

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About

The CT&M market is highly dependent on the growth of telecommunications industry. An increase in subscriber base, operators move towards 3G, World Wide Interoperability for Microwave Access (WiMax) Technologies, and Research and Development (R&D) investments in the emerging Long Term Evolution (LTE) and LTE-Advanced technologies have fuelled the growth of the telecommunications industries. These initiatives demand for increased LTE/4G trial runs which in turn trigger the demand for CT&M products to optimize the networks.

The CT&M products help network operators, equipment manufacturers and broadband service providers to deliver high quality triple-play services: voice, video and data over mobile and fixed networks. The CT&M solutions help network operators in deployment of new services, help in reducing CAPEX and assist in delivering Quality of Service (QoS) across each phase of network life cycle, which include R&D, manufacturing, deployment and service assurance.

The CT&M solution also helps broadband service providers and operators to deliver high Quality Experience (QoE) to their users and ensure effective management of services such as Voice over Internet protocol (VoIP) and Internet Protocol TV (IPTV) services by providing visibility into end-user experience and facilitates repair, calibration, instrument management, deployment and maintenance of networks and services.

The wireless industry is offering tremendous growth opportunities for the test equipment vendors. The wireless standards are evolving rapidly with increasing bandwidth demand and higher data transmission rates. The growing number of mobile and internet subscribers and increasing adoption of broadband services and evolving communication standards such as LTE, LTE-Advanced are fuelling the demand for CT&M products.

The major players in CT&M market such as, JDSU, Agilent Technologies, Anritsu, EXFO, IXIA, Rohde & Schwarz, National Instruments, etc. are finding huge potential in the market with wireless test and measurement products.

The report broadly comprises type of communication test equipment: wireless and wireline; type of communication test: enterprise test, field network test, lab and manufacturing test, network assurance test; type of services: product support services, professional services, managed services; end-users: Network Equipment Manufacturers

(NEMs), mobile device manufacturers, telecommunication service providers, enterprises; regions: North America, Europe, APAC, MEA and LA.

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