

Digital OSS-BSS Market Forecasts to 2034 – Global Analysis By Component (Solutions and Services), Deployment Mode, Cloud Type, Organization Size, Application, End User and By Geography

<https://marketpublishers.com/r/DF9151F5F6AFEN.html>

Date: June 2026

Pages: 200

Price: US\$ 4,150.00 (Single User License)

ID: DF9151F5F6AFEN

Abstracts

According to Statistics MRC, the Global Digital OSS-BSS Market is accounted for \$22.6 billion in 2026 and is expected to reach \$86.4 billion by 2034 growing at a CAGR of 18.2% during the forecast period. Digital operations support systems and business support systems refer to the integrated software platforms enabling telecommunications service providers and digital communications operators to manage, monetize, and continuously evolve their network infrastructure, service catalog, customer relationships, and revenue assurance processes in a digitally transformed operational environment. Operations support systems encompass network inventory management, service provisioning orchestration, network performance monitoring, fault management, and network configuration platforms that automate telecom network lifecycle management. Business support systems include customer relationship management, subscription billing and revenue management, product catalog, order management, partner ecosystem management, and analytics platforms that digitize the commercial and financial operations of communications service providers across 5G, fiber, cloud, and converged service delivery environments.

Market Dynamics:

Driver:

5G network monetization and digital service complexity management

5G network deployment, creating fundamentally new service monetization opportunities,

including network slicing, edge computing service delivery, and ultra-low-latency application enablement, requires sophisticated digital OSS-BSS capabilities that legacy telecommunications management systems designed for voice and broadband service management cannot support. Communications service providers competing in B2B 5G enterprise service markets offering customized network slice guarantees, dynamic QoS management, and consumption-based billing require AI-powered OSS orchestration and BSS monetization platforms capable of managing service complexity at scale. Cloud-native OSS-BSS transformation enabling rapid service innovation and partner ecosystem integration is becoming a competitive differentiator, determining which operators can successfully monetize 5G network investments.

Restraint:

Legacy OSS-BSS system complexity and transformation risk

Telecommunications operators managing decades-old OSS-BSS system portfolios with deeply embedded business logic, extensive customization, and complex integration dependencies face substantial technical and financial risks in digital OSS-BSS transformation programs. The business-critical nature of billing, provisioning, and network management functions creates extremely low tolerance for transformation-related operational disruption, requiring complex parallel running periods and extensive regression testing that dramatically extend program timelines and costs.

Telecommunications operator organizational resistance to business process change, accompanying system replacement, and vendor dependency concerns around cloud-native OSS-BSS platform lock-in create program governance challenges that delay digital transformation initiatives.

Opportunity:

Cloud communications and SaaS operator segment expansion

Rapid growth of cloud communications platforms, virtual network operators, and SaaS-based communication service providers requiring cloud-native OSS-BSS capabilities without the legacy system burden of incumbent telecommunications operators represents an expanding addressable market segment for modern digital OSS-BSS platforms. The API-first, microservices-based architecture of cloud-native OSS-BSS platforms, enabling rapid partner ecosystem integration, flexible monetization model support, and continuous feature deployment, aligns with the operational model of digital-native communications providers who are capturing growing market share from

traditional telecommunications operators. New entrant 5G private network operators and neutral host infrastructure providers represent additional greenfield digital OSS-BSS deployment opportunities.

Threat:

Hyperscaler cloud provider communications platform competition

Amazon Web Services, Google Cloud, and Microsoft Azure are developing comprehensive cloud communications and network management platforms that compete directly with traditional OSS-BSS vendors by offering telco-grade network management, billing, and customer experience capabilities within established cloud customer relationships create competitive pressure on specialist OSS-BSS providers. Communications service providers adopting hyperscaler cloud infrastructure for network functions virtualization face increasing commercial pressure to consolidate OSS-BSS management within hyperscaler platform ecosystems, threatening the market position of independent OSS-BSS vendors unable to match hyperscaler integration advantages and pricing leverage in cloud-committed enterprise accounts.

Covid-19 Impact:

The pandemic created massive telecommunications network capacity demand from remote work and a surge in digital entertainment that overwhelmed legacy OSS provisioning and monitoring systems, demonstrating the operational limitations of non-digital OSS-BSS architectures under extreme traffic conditions. Pandemic-accelerated enterprise cloud migration, creating new digital service delivery requirements, drove telecommunications operator investment in digital BSS monetization and service catalog management platforms. Post-pandemic, 5G network deployment and enterprise digital service monetization programs are sustaining strong OSS-BSS transformation investment.

The services segment is expected to be the largest during the forecast period

The services segment is expected to account for the largest market share during the forecast period, due to the substantial system integration, migration, customization, managed services, and operational support revenue generated by digital OSS-BSS transformation programs across global telecommunications operators. The complexity of telecommunications operator system environments and business process dependencies creates extensive professional services engagement requirements that

generate multi-year service revenue programs substantially exceeding software licensing value across the OSS-BSS customer transformation lifecycle.

The cloud segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the cloud segment is predicted to witness the highest growth rate, driven by telecommunications operators' cloud-native OSS-BSS transformation programs replacing legacy on-premises systems with microservices-based, containerized platforms enabling 5G service orchestration, agility and DevOps-based operational model adoption. Cloud-native OSS-BSS platforms providing continuous deployment capability, elastic scaling for demand-variable operational workloads, and reduced infrastructure capital expenditure requirements are accelerating operator adoption, particularly among mid-tier and digital-native operators seeking to match agile digital service delivery capabilities of hyperscaler-backed competitor communications platforms.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, due to the most advanced 5G network commercialization, the highest enterprise digital service monetization investment, and the concentration of leading OSS-BSS platform vendors. The United States telecommunications sector's aggressive 5G network slicing commercialization programs and enterprise private network deployments are creating the highest-value digital OSS-BSS transformation requirements globally.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, due to the world's largest 5G subscriber base in China, South Korea, and Japan, combined with massive telecommunications infrastructure digitalization investment across emerging Asian markets. Asia Pacific telecom operators deploying 5G enterprise services, IoT connectivity platforms, and cloud communication offerings require digital OSS-BSS transformation capabilities that are driving the fastest regional market growth globally.

Key players in the market

Some of the key players in Digital OSS-BSS Market include Amdocs Limited, Oracle

Corporation, Huawei Technologies Co. Ltd., Ericsson AB, Nokia Corporation, Netcracker Technology Corporation, CSG Systems International Inc., Comarch SA, Infosys Limited, Cisco Systems Inc., Hewlett Packard Enterprise Company, IBM Corporation, Accenture PLC, Capgemini SE, Tata Consultancy Services Limited, Tech Mahindra Limited, and Aria Systems Inc..

Key Developments:

In April 2026, Amdocs Limited launched a cloud-native 5G monetization BSS platform with AI-powered dynamic network slice pricing and real-time consumption-based billing for enterprise private network and B2B 5G service commercialization.

In March 2026, Ericsson AB introduced an autonomous network OSS platform integrating AI-driven network optimization, self-healing operations, and zero-touch provisioning for 5G standalone network slice lifecycle management.

In February 2026, Nokia Corporation released a cloud-native OSS platform with digital twin-based network planning and predictive performance management, enabling telecommunications operators to accelerate 5G service deployment timelines.

Components Covered:

Solutions

Services

Deployment Modes Covered:

Cloud

On-Premises

Cloud Types Covered:

Public Cloud

Private Cloud

Hybrid Clouds

Organization Sizes Covered:

Large Enterprises

Small & Medium Enterprises

Applications Covered:

Network Management

Revenue Management

Customer Management

Service Fulfillment

Service Assurance

Product Management

Subscriber Data Management

End Users Covered:

IT & Telecom

BFSI

Media & Entertainment

Retail & E-Commerce

Government

Other End User

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free

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customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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