

B2B Telecommunication Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented, By Solution (WAN Solution, Voice over IP (VoIP), M2M Communication, Cloud Services, Unified Communication, and Collaboration), By Enterprise Size (Large Enterprise and SMEs), By Industry Vertical (Retail, Media & Entertainment, Energy & Utilities, Healthcare, Transportation & Logistics, Banking, Financial Services and Insurance (BFSI), and Others), By Region & Competition, 2021-2031F

<https://marketpublishers.com/r/BF7847FC4D46EN.html>

Date: January 2026

Pages: 180

Price: US\$ 4,500.00 (Single User License)

ID: BF7847FC4D46EN

Abstracts

The Global B2B Telecommunication Market is projected to expand from USD 64.82 billion in 2025 to USD 152.22 billion by 2031, reflecting a CAGR of 15.29%. This sector encompasses the delivery of infrastructure and communication services tailored for enterprise activities, including private network solutions, data, and voice capabilities. The market is primarily fueled by the accelerating requirement for digital transformation and the extensive integration of the Internet of Things, which necessitates reliable connectivity for automated industrial functions. This expansion is further bolstered by a transition toward cloud-based unified communications platforms that facilitate seamless collaboration among geographically distributed teams. In 2024, the Global mobile Suppliers Association noted that references for private mobile network deployments reached 1,603, underscoring the growing dependence on dedicated corporate connectivity.

Despite this positive outlook, the market encounters a substantial obstacle regarding the

massive capital expenditure needed to modernize legacy infrastructure. Adopting advanced technologies such as fiber optics and 5G entails high costs and technical complexities, which often delays implementation for smaller enterprises with restricted budgets. Additionally, navigating the diverse regulatory frameworks across various regions creates further challenges for telecommunication providers striving to scale their services globally while adhering to local data protection mandates.

Market Driver

The extensive rollout of high-speed 5G enterprise networks acts as a primary catalyst for growth, fundamentally transforming how businesses handle connectivity and critical infrastructure. Telecommunication providers are aggressively upgrading their architectures to standalone 5G to provide the massive connection density and ultra-low latency required for remote monitoring and industrial automation. This structural advancement facilitates the creation of private network slices that deliver guaranteed bandwidth and enhanced security for corporate clients, distinguishing modern B2B services from legacy offerings. As reported by the GSMA in 'The Mobile Economy 2024' (February 2024), mobile operators globally are expected to invest USD 1.5 trillion in their networks between 2023 and 2030, with 92% of this capital expenditure allocated to 5G deployments.

Concurrently, the integration of analytics and AI-driven network automation is enhancing providers' abilities to sustain robust service levels despite rising data complexity. By utilizing artificial intelligence, operators can dynamically optimize traffic flow, automate complex troubleshooting, and predict network congestion, all of which are vital for supporting bandwidth-heavy enterprise applications. This operational shift lowers maintenance expenses while improving the reliability of services delivered to business customers. According to IBM's 'Global AI Adoption Index 2023' (January 2024), approximately 42% of enterprise-scale organizations have actively deployed AI technologies. Such automation is essential for managing escalating demand, with Ericsson reporting that global mobile network data traffic reached 145 exabytes per month in the first quarter of 2024.

Market Challenge

The immense capital expenditure necessary to upgrade legacy infrastructure creates a significant barrier to the expansion of the global B2B telecommunication sector. Deploying modern network technologies, such as extensive fiber optic systems and 5G, involves substantial financial investment, which directly strains the operational budgets

of service providers. This high cost structure often slows the rate at which telecommunication companies can modernize their networks, thereby postponing the availability of advanced connectivity solutions required by enterprise clients.

Consequently, smaller enterprises with limited financial resources frequently struggle to access these newer technologies, restricting their ability to leverage high-speed private networks. This financial burden affects the broader market ecosystem by limiting the potential customer base for advanced B2B services. As projected by the GSMA in 2024, mobile operators worldwide are expected to invest 1.5 trillion US dollars in mobile capital expenditure between 2023 and 2030, with the vast majority dedicated to 5G networks. This magnitude of required investment highlights the intense economic pressure on the industry, which hampers the rapid scaling of services across different regions and market segments.

Market Trends

Telecommunication operators are increasingly transitioning toward API-driven programmable network ecosystems to monetize their infrastructure beyond standard connectivity. By exposing network capabilities such as Quality on Demand, device location, and carrier billing through standardized Application Programming Interfaces (APIs), providers enable enterprise developers to integrate telecom functions directly into business applications. This shift allows for the seamless creation of fraud prevention and logistics solutions that operate across multiple carriers, transforming the network into a programmable platform for B2B innovation. According to the GSMA's 'GSMA Open Gateway: State of the Market, H1 2024' report from June 2024, 49 mobile operator groups representing approximately 65% of global mobile connections have committed to this initiative, highlighting the industry-wide move toward open network accessibility.

Simultaneously, the market is witnessing a convergence of Low Earth Orbit (LEO) satellite constellations with terrestrial networks to ensure ubiquitous enterprise coverage. This integration addresses the critical need for resilient connectivity in remote and underserved regions, supporting sectors such as maritime, agriculture, and mining where terrestrial infrastructure is often insufficient. By incorporating Non-Terrestrial Networks (NTN) into their service portfolios, B2B providers can offer seamless failover and extended reach for IoT devices and mission-critical communications, bridging the digital divide for global operations. According to the Satellite Industry Association's '2024 State of the Satellite Industry Report' (June 2024), satellite broadband revenue grew by 40% in 2023, underscoring the rapidly expanding demand for these space-

based connectivity solutions within the broader telecommunication landscape.

Key Market Players

AT&T Inc.

Verizon Communications Inc.

BT Group plc

Deutsche Telekom AG

Vodafone Group Plc

Orange S.A.

China Mobile Limited

NTT Communications Corporation

Telefonica S.A.

Tata Communications Limited

Report Scope

In this report, the Global B2B Telecommunication Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

B2B Telecommunication Market, By Solution

WAN Solution

Voice over IP (VoIP)

M2M Communication

Cloud Services

Unified Communication

Collaboration

B2B Telecommunication Market, By Enterprise Size

Large Enterprise

SMEs

B2B Telecommunication Market, By Industry Vertical

Retail

Media & Entertainment

Energy & Utilities

Healthcare

Transportation & Logistics

Banking

Financial Services and Insurance (BFSI)

Others

B2B Telecommunication Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global B2B Telecommunication Market.

Available Customizations:

Global B2B Telecommunication Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

4. VOICE OF CUSTOMER

5. GLOBAL B2B TELECOMMUNICATION MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Solution (WAN Solution, Voice over IP (VoIP), M2M Communication, Cloud Services, Unified Communication, Collaboration)
 - 5.2.2. By Enterprise Size (Large Enterprise, SMEs)
 - 5.2.3. By Industry Vertical (Retail, Media & Entertainment, Energy & Utilities,

Healthcare, Transportation & Logistics, Banking, Financial Services and Insurance (BFSI), Others)

5.2.4. By Region

5.2.5. By Company (2025)

5.3. Market Map

6. NORTH AMERICA B2B TELECOMMUNICATION MARKET OUTLOOK

6.1. Market Size & Forecast

6.1.1. By Value

6.2. Market Share & Forecast

6.2.1. By Solution

6.2.2. By Enterprise Size

6.2.3. By Industry Vertical

6.2.4. By Country

6.3. North America: Country Analysis

6.3.1. United States B2B Telecommunication Market Outlook

6.3.1.1. Market Size & Forecast

6.3.1.1.1. By Value

6.3.1.2. Market Share & Forecast

6.3.1.2.1. By Solution

6.3.1.2.2. By Enterprise Size

6.3.1.2.3. By Industry Vertical

6.3.2. Canada B2B Telecommunication Market Outlook

6.3.2.1. Market Size & Forecast

6.3.2.1.1. By Value

6.3.2.2. Market Share & Forecast

6.3.2.2.1. By Solution

6.3.2.2.2. By Enterprise Size

6.3.2.2.3. By Industry Vertical

6.3.3. Mexico B2B Telecommunication Market Outlook

6.3.3.1. Market Size & Forecast

6.3.3.1.1. By Value

6.3.3.2. Market Share & Forecast

6.3.3.2.1. By Solution

6.3.3.2.2. By Enterprise Size

6.3.3.2.3. By Industry Vertical

7. EUROPE B2B TELECOMMUNICATION MARKET OUTLOOK

7.1. Market Size & Forecast

7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Solution

7.2.2. By Enterprise Size

7.2.3. By Industry Vertical

7.2.4. By Country

7.3. Europe: Country Analysis

7.3.1. Germany B2B Telecommunication Market Outlook

7.3.1.1. Market Size & Forecast

7.3.1.1.1. By Value

7.3.1.2. Market Share & Forecast

7.3.1.2.1. By Solution

7.3.1.2.2. By Enterprise Size

7.3.1.2.3. By Industry Vertical

7.3.2. France B2B Telecommunication Market Outlook

7.3.2.1. Market Size & Forecast

7.3.2.1.1. By Value

7.3.2.2. Market Share & Forecast

7.3.2.2.1. By Solution

7.3.2.2.2. By Enterprise Size

7.3.2.2.3. By Industry Vertical

7.3.3. United Kingdom B2B Telecommunication Market Outlook

7.3.3.1. Market Size & Forecast

7.3.3.1.1. By Value

7.3.3.2. Market Share & Forecast

7.3.3.2.1. By Solution

7.3.3.2.2. By Enterprise Size

7.3.3.2.3. By Industry Vertical

7.3.4. Italy B2B Telecommunication Market Outlook

7.3.4.1. Market Size & Forecast

7.3.4.1.1. By Value

7.3.4.2. Market Share & Forecast

7.3.4.2.1. By Solution

7.3.4.2.2. By Enterprise Size

7.3.4.2.3. By Industry Vertical

7.3.5. Spain B2B Telecommunication Market Outlook

7.3.5.1. Market Size & Forecast

- 7.3.5.1.1. By Value
- 7.3.5.2. Market Share & Forecast
 - 7.3.5.2.1. By Solution
 - 7.3.5.2.2. By Enterprise Size
 - 7.3.5.2.3. By Industry Vertical

8. ASIA PACIFIC B2B TELECOMMUNICATION MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Solution
 - 8.2.2. By Enterprise Size
 - 8.2.3. By Industry Vertical
 - 8.2.4. By Country
- 8.3. Asia Pacific: Country Analysis
 - 8.3.1. China B2B Telecommunication Market Outlook
 - 8.3.1.1. Market Size & Forecast
 - 8.3.1.1.1. By Value
 - 8.3.1.2. Market Share & Forecast
 - 8.3.1.2.1. By Solution
 - 8.3.1.2.2. By Enterprise Size
 - 8.3.1.2.3. By Industry Vertical
 - 8.3.2. India B2B Telecommunication Market Outlook
 - 8.3.2.1. Market Size & Forecast
 - 8.3.2.1.1. By Value
 - 8.3.2.2. Market Share & Forecast
 - 8.3.2.2.1. By Solution
 - 8.3.2.2.2. By Enterprise Size
 - 8.3.2.2.3. By Industry Vertical
 - 8.3.3. Japan B2B Telecommunication Market Outlook
 - 8.3.3.1. Market Size & Forecast
 - 8.3.3.1.1. By Value
 - 8.3.3.2. Market Share & Forecast
 - 8.3.3.2.1. By Solution
 - 8.3.3.2.2. By Enterprise Size
 - 8.3.3.2.3. By Industry Vertical
 - 8.3.4. South Korea B2B Telecommunication Market Outlook
 - 8.3.4.1. Market Size & Forecast

- 8.3.4.1.1. By Value
- 8.3.4.2. Market Share & Forecast
 - 8.3.4.2.1. By Solution
 - 8.3.4.2.2. By Enterprise Size
 - 8.3.4.2.3. By Industry Vertical
- 8.3.5. Australia B2B Telecommunication Market Outlook
 - 8.3.5.1. Market Size & Forecast
 - 8.3.5.1.1. By Value
 - 8.3.5.2. Market Share & Forecast
 - 8.3.5.2.1. By Solution
 - 8.3.5.2.2. By Enterprise Size
 - 8.3.5.2.3. By Industry Vertical

9. MIDDLE EAST & AFRICA B2B TELECOMMUNICATION MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Solution
 - 9.2.2. By Enterprise Size
 - 9.2.3. By Industry Vertical
 - 9.2.4. By Country
- 9.3. Middle East & Africa: Country Analysis
 - 9.3.1. Saudi Arabia B2B Telecommunication Market Outlook
 - 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
 - 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Solution
 - 9.3.1.2.2. By Enterprise Size
 - 9.3.1.2.3. By Industry Vertical
 - 9.3.2. UAE B2B Telecommunication Market Outlook
 - 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value
 - 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Solution
 - 9.3.2.2.2. By Enterprise Size
 - 9.3.2.2.3. By Industry Vertical
 - 9.3.3. South Africa B2B Telecommunication Market Outlook
 - 9.3.3.1. Market Size & Forecast

9.3.3.1.1. By Value

9.3.3.2. Market Share & Forecast

9.3.3.2.1. By Solution

9.3.3.2.2. By Enterprise Size

9.3.3.2.3. By Industry Vertical

10. SOUTH AMERICA B2B TELECOMMUNICATION MARKET OUTLOOK

10.1. Market Size & Forecast

10.1.1. By Value

10.2. Market Share & Forecast

10.2.1. By Solution

10.2.2. By Enterprise Size

10.2.3. By Industry Vertical

10.2.4. By Country

10.3. South America: Country Analysis

10.3.1. Brazil B2B Telecommunication Market Outlook

10.3.1.1. Market Size & Forecast

10.3.1.1.1. By Value

10.3.1.2. Market Share & Forecast

10.3.1.2.1. By Solution

10.3.1.2.2. By Enterprise Size

10.3.1.2.3. By Industry Vertical

10.3.2. Colombia B2B Telecommunication Market Outlook

10.3.2.1. Market Size & Forecast

10.3.2.1.1. By Value

10.3.2.2. Market Share & Forecast

10.3.2.2.1. By Solution

10.3.2.2.2. By Enterprise Size

10.3.2.2.3. By Industry Vertical

10.3.3. Argentina B2B Telecommunication Market Outlook

10.3.3.1. Market Size & Forecast

10.3.3.1.1. By Value

10.3.3.2. Market Share & Forecast

10.3.3.2.1. By Solution

10.3.3.2.2. By Enterprise Size

10.3.3.2.3. By Industry Vertical

11. MARKET DYNAMICS

- 11.1. Drivers
- 11.2. Challenges

12. MARKET TRENDS & DEVELOPMENTS

- 12.1. Merger & Acquisition (If Any)
- 12.2. Product Launches (If Any)
- 12.3. Recent Developments

13. GLOBAL B2B TELECOMMUNICATION MARKET: SWOT ANALYSIS

14. PORTER'S FIVE FORCES ANALYSIS

- 14.1. Competition in the Industry
- 14.2. Potential of New Entrants
- 14.3. Power of Suppliers
- 14.4. Power of Customers
- 14.5. Threat of Substitute Products

15. COMPETITIVE LANDSCAPE

- 15.1. AT&T Inc.
 - 15.1.1. Business Overview
 - 15.1.2. Products & Services
 - 15.1.3. Recent Developments
 - 15.1.4. Key Personnel
 - 15.1.5. SWOT Analysis
- 15.2. Verizon Communications Inc.
- 15.3. BT Group plc
- 15.4. Deutsche Telekom AG
- 15.5. Vodafone Group Plc
- 15.6. Orange S.A.
- 15.7. China Mobile Limited
- 15.8. NTT Communications Corporation
- 15.9. Telefonica S.A.
- 15.10. Tata Communications Limited

16. STRATEGIC RECOMMENDATIONS

17. ABOUT US & DISCLAIMER

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