

Global Virtualized Evolved Packet Core Market by Component Type (Solution (MME, HSS, S-GW, PDN-GW), Service (Professional Services, Managed Service, Consulting, Integration & Development, and Training & Support)), By Deployment Mode (Cloud, On-Premises), By End User (Telecom Operator, Enterprises), By Region, Competition, 2018-2028

<https://marketpublishers.com/r/G33700C1E662EN.html>

Date: November 2023

Pages: 190

Price: US\$ 4,900.00 (Single User License)

ID: G33700C1E662EN

Abstracts

The projected market size for the global virtualized evolved packet core market is expected to reach USD 5.81 billion by the end of 2022, with a compound annual growth rate (CAGR) of 19.17% during the forecast period. The global virtualized evolved packet core (vEPC) market is a rapidly evolving sector within the telecommunications industry. vEPC technology represents a paradigm shift from traditional hardware-based network architectures to more flexible and scalable solutions. Cloud-based deployment models are gaining prominence, driven by the need for agile and cost-efficient network management. This market is characterized by the influential role of North America, a hub for technological innovation and a strong vEPC presence. Telecom operators are key players, leveraging vEPC to enhance network capabilities and deliver high-performance services, especially with the advent of 5G. While offering transformative benefits, challenges around security and integration require careful attention as the market continues to advance.

Key Market Drivers

Rapid Evolution of Communication Networks and 5G Rollout

The swift evolution of communication networks, accompanied by the global rollout of 5G

technology, stands as a significant driver propelling the growth of the virtualized evolved packet core (vEPC) market. With the advent of 5G, the demand for higher data speeds, low latency, and seamless connectivity has escalated substantially. Traditional hardware-based packet core solutions struggle to meet these demands efficiently due to their inherent limitations in scalability and flexibility. This creates a strong impetus for the adoption of vEPC, which provides the necessary agility to dynamically allocate resources, optimize network performance, and deliver the quality of service demanded by emerging applications such as IoT, edge computing, and augmented reality.

Cloud-Native Architectures and Network Virtualization

Cloud-native architectures and the broader trend of network virtualization constitute another influential driver in the global vEPC market. The shift towards cloud-based deployment models, facilitated by advances in network function virtualization (NFV) and software-defined networking (SDN), has gained traction due to the numerous benefits it offers. Cloud-native vEPC solutions enable telecom operators and enterprises to scale resources efficiently, deploy services rapidly, and reduce operational costs. This flexibility is crucial as the demand for network services fluctuates, allowing for resource allocation based on real-time requirements. As the industry witnesses the convergence of cloud and networking technologies, the demand for agile, software-based vEPC solutions is set to increase.

Economic and Operational Advantages

The economic and operational advantages of adopting vEPC solutions represent a compelling driver for businesses across the globe. Traditional hardware-centric architectures require substantial upfront investments and ongoing maintenance costs. In contrast, vEPC's software-driven approach significantly reduces capital expenditures by utilizing off-the-shelf hardware and optimizing resource utilization through virtualization. Moreover, the centralized management and orchestration capabilities of vEPC streamline operations, simplify network management, and enhance overall efficiency. This results in quicker service deployment, improved resource allocation, and reduced time-to-market for new offerings. The potential to achieve cost savings, operational efficiency, and accelerated service innovation further bolsters the case for vEPC adoption among enterprises and telecom operators alike.

Surge in IoT Devices and Edge Computing

The exponential growth of Internet of Things (IoT) devices and the rise of edge

computing amplify the demand for vEPC solutions. IoT devices generate vast amounts of data, often in real-time, requiring networks to handle massive throughput and low latency. vEPC's ability to dynamically allocate resources and prioritize traffic ensures that IoT applications function optimally. Additionally, the deployment of edge computing, which brings processing closer to data sources, necessitates efficient packet processing and low-latency communication. vEPC's software-based architecture facilitates the implementation of edge services, enabling quicker decision-making and enhanced user experiences. As the IoT ecosystem expands and edge computing gains momentum, the vEPC market is poised to capitalize on these trends, providing the necessary network foundation for seamless IoT connectivity and responsive edge computing applications.

Key Market Challenges

Complex Integration and Migration Processes

The global adoption of virtualized evolved packet core (vEPC) solutions is hindered by the complex integration and migration processes required for transitioning from legacy hardware-based architectures. Many service providers and enterprises currently operate traditional EPC systems, which have been in place for years and are deeply embedded within their networks. The challenge lies in seamlessly integrating vEPC solutions with existing infrastructure while ensuring uninterrupted service delivery. The migration process entails careful planning, meticulous testing, and robust validation to prevent service disruptions and maintain quality of service (QoS) for end-users. This complexity can deter organizations from fully embracing vEPC, especially those concerned about the potential risks associated with the transition. Moreover, the need to manage hybrid environments during the migration phase can introduce additional complexities, necessitating comprehensive strategies and expert support.

Network Security and Privacy Concerns

As the virtualized evolved packet core market expands, network security and privacy concerns have emerged as critical challenges. Virtualized environments are vulnerable to a different set of cybersecurity risks compared to their hardware-based counterparts. Virtualization introduces the risk of hypervisor vulnerabilities, unauthorized access to virtualized resources, and potential breaches through shared virtualization infrastructure. In the context of vEPC, these security challenges are amplified due to the sensitive nature of data flowing through the network, including user information and communication data. Ensuring the confidentiality, integrity, and availability of data within virtualized environments requires robust encryption mechanisms, secure identity

management, and stringent access controls. Additionally, the need to comply with evolving data protection regulations such as GDPR, CCPA, and regional data sovereignty laws further complicates the security landscape. Addressing these concerns demands a multi-layered security approach that encompasses network segmentation, real-time threat detection, and continuous monitoring.

Key Market Trends

Convergence of 5G and Edge Computing

The convergence of 5G technology and edge computing is a transformative trend shaping the global virtualized evolved packet core (vEPC) market. As 5G networks become increasingly widespread, the demand for ultra-low latency and real-time communication intensifies, especially for applications like autonomous vehicles, industrial automation, and immersive augmented reality experiences. This demand aligns seamlessly with the capabilities offered by edge computing, which decentralizes data processing closer to the data source, reducing latency and enhancing responsiveness. vEPC solutions are at the forefront of facilitating this convergence by providing the necessary network agility to support edge deployments effectively. This trend not only drives the adoption of vEPC but also underscores its role as an enabler of 5G-powered edge computing applications, propelling the market forward.

Integration of AI and Automation

The integration of artificial intelligence (AI) and automation is emerging as a pivotal trend in the global vEPC market. With the increasing complexity of networks and the growing demand for diverse services, AI-driven insights and automation are becoming crucial for efficient network management and optimization. vEPC solutions, with their software-based architecture, are well-suited for integration with AI algorithms that can analyze network performance, predict traffic patterns, and proactively allocate resources. Automation further enhances operational efficiency by streamlining routine tasks such as provisioning, scaling, and troubleshooting. As the vEPC landscape evolves, the synergy between AI and automation will become a key differentiator, allowing businesses to offer enhanced user experiences, reduce operational costs, and unlock new opportunities for innovation.

Focus on Network Security and Privacy

In the era of data breaches and increasing regulatory scrutiny, network security and

privacy have become critical considerations across industries. This trend is significantly impacting the global vEPC market as enterprises and telecom operators seek solutions that can ensure the integrity and confidentiality of their data and communications. Virtualized evolved packet core solutions are no exception, requiring robust security measures to protect sensitive user information and prevent unauthorized access. As vEPC technology continues to gain traction, cybersecurity solutions tailored for virtualized environments are on the rise. This includes advanced encryption protocols, intrusion detection systems, and identity management mechanisms. Additionally, compliance with regulations like GDPR and CCPA is driving the adoption of privacy-enhancing features within vEPC architectures. The emphasis on network security and privacy not only addresses current concerns but also fosters trust among users and stakeholders, playing a crucial role in shaping the vEPC market's trajectory.

Segmental Insights

Deployment Mode Insights

Based on deployment mode, the cloud segment emerges as the predominant segment, exhibiting unwavering dominance projected throughout the forecast period. The ascendancy of the cloud segment underscores the growing shift towards flexible and scalable solutions in the market. As businesses increasingly recognize the benefits of cloud deployment, including enhanced accessibility, cost-efficiency, and streamlined operations, the cloud segment is positioned as the go-to choice for forward-looking enterprises. Its unyielding dominance not only reflects its present impact but also anticipates a future where cloud-based solutions continue to redefine the contours of the market. As technology evolves and businesses seek agile solutions, the cloud segment's unwavering influence remains a pivotal driver of innovation and transformation in the deployment landscape.

End User Insights

Based on end user, the telecom operator segment emerges as a formidable frontrunner, exerting its dominance and shaping the market's trajectory throughout the forecast period. The telecom operator segment's ascension to this formidable position is a testament to its integral role in shaping and driving the industry forward. With the evolving technological landscape and surging demand for seamless connectivity, telecom operators are positioned at the heart of innovation. Their ability to navigate and adapt to changing consumer needs, coupled with their infrastructure prowess, cements their role as the driving force behind the market's evolution. As the forecast unfolds, the

telecom operator segment's unwavering grip on its position not only underscores its current influence but also signals a continuous journey of advancements and transformative impacts on the market's trajectory.

Regional Insights

North America firmly establishes itself as a commanding presence within the global virtualized evolved packet core market, affirming its preeminent position, and highlighting its pivotal role in shaping the industry's course. With unwavering authority, the region asserts its preeminent status, underscoring its pivotal role in defining the trajectory of the industry. Fueled by a potent blend of technological innovation, robust infrastructure, and a forward-looking approach, North America emerges as a driving force in reshaping communication networks. As a hub for cutting-edge research and development, the region's impact resonates globally, propelling the evolution of virtualized evolved packet core solutions. This dominance not only underscores North America's current position but also foreshadows its ongoing commitment to steering the industry's progression through advancements that transcend geographical boundaries.

Key Market Players

Telefonaktiebolaget LM Ericsson

Huawei Technologies Co. Ltd.

Cisco Systems Inc.

NEC Corporation

Nokia Corporation

Affirmed Solutions Inc.

Mavenir Inc.

ZTE Corporation

Athonet Srl

Samsung Electronics Co. Ltd.

Report Scope:

In this report, the global virtualized evolved packet core market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Global Virtualized Evolved Packet Core Market, By Component Type:

Solution

MME

HSS

S-GW

PDN-GW

Service

Professional Services

Managed Service

Consulting

Integration & Development

Training & Support

Global Virtualized Evolved Packet Core Market, By Deployment Mode:

Cloud

On-Premises

Global Virtualized Evolved Packet Core Market, By End User:

Telecom Operator

Enterprises

Global Virtualized Evolved Packet Core Market, By Region:

North America

Europe

South America

Middle East & Africa

Asia Pacific

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Virtualized Evolved Packet Core Market.

Available Customizations:

Global Virtualized Evolved Packet Core market report with the given market data, Tech Sci 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).

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