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OSS & BSS Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Component (Service and Solution), By Deployment Mode (On-premises and Cloud), By Organization Size (Small- & Medium-sized Enterprises and Large Enterprises), By Industry Vertical (IT & Telecom, BFSI, Media & Entertainment, Retail & E-Commerce, and Others), By Region & Competition, 2021-2031F

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Abstracts

The Global OSS & BSS Market is projected to expand significantly, growing from USD 80.14 Billion in 2025 to USD 163.42 Billion by 2031 at a CAGR of 12.61%. This sector encompasses the integrated software frameworks that telecommunication operators rely on to manage network performance, service provisioning, customer billing, and revenue assurance. Key drivers fueling this growth include the critical need to monetize 5G infrastructure, which demands systems capable of processing high-volume, low-latency transactions. Additionally, the relentless rise in global data consumption forces service providers to improve operational efficiency and automate complex workflows to ensure network reliability, independent of broader technological trends.

However, market expansion faces a major hurdle in integrating agile, modern software with rigid legacy architectures, a process that often results in high implementation costs and operational silos. This modernization is becoming increasingly urgent to support the expanding global subscriber base. The International Telecommunication Union estimates that nearly 6 billion individuals will be online in 2025, creating a necessity for scalable and robust support systems. Failure to effectively bridge these technical gaps threatens to stall digital transformation initiatives and negatively impact the subscriber

experience.

Market Driver

The rapid deployment of 5G networks and the subsequent monetization of network slicing functions act as fundamental propellants for the market. As operators transition from non-standalone to standalone 5G architectures, they require advanced Operational Support Systems (OSS) to orchestrate dynamic network slices and Business Support Systems (BSS) to manage complex, real-time billing models. This infrastructure upgrade is essential to accommodate the surge of high-speed users and ensure service level agreements are met for enterprise clients. According to the June 2024 'Ericsson Mobility Report', 5G subscriptions increased by 160 million in the first quarter of 2024, underscoring the immediate pressure on provisioning and charging systems to scale effectively.

Simultaneously, the growing demand for AI-driven customer experience and personalization is reshaping investment priorities within the sector. Communication service providers are integrating generative AI into their BSS stacks to automate support interactions and deliver hyper-personalized service offers, thereby reducing churn and operational costs. In the February 2024 'State of AI in Telecommunications: 2024 Trends' report by NVIDIA, 57 percent of surveyed telecom professionals identified improving customer engagement as their primary objective for adopting generative AI. These intelligent layers are critical for managing the ecosystem's value; the GSMA reported in 2024 that mobile technologies and services generated $5.7 trillion of economic value added globally in 2023.

Market Challenge

The primary obstacle facing the Global OSS & BSS Market is the difficulty of integrating agile software with rigid legacy architectures. Telecommunication operators frequently encounter high costs and technical complexities when attempting to modernize established infrastructure. These legacy systems often lack the flexibility required to communicate seamlessly with newer platforms, leading to operational silos that fragment data and workflow processes. Consequently, the market experiences slower adoption rates for advanced solutions as resources are consumed by the maintenance of incompatible interfaces rather than innovation.

This lack of interoperability directly impacts the ability of service providers to handle increasing network demands. When critical updates are delayed by integration hurdles, the market struggles to support the rapid rollout of next-generation connectivity. According to the GSMA, 5G connections were projected in 2024 to represent over 50 percent of total mobile connections by 2029. This significant trajectory highlights the severity of the challenge, as the persistence of legacy constraints limits the scalability required to accommodate such extensive network evolution.

Market Trends

The market is being reshaped by an accelerated migration to cloud-native and microservices architectures, as operators dismantle rigid legacy stacks in favor of agile, scalable environments. This transition allows providers to decouple software from hardware, facilitating rapid service deployment and efficient resource utilization across hybrid clouds. By adopting containerized applications, operators gain the operational flexibility needed to manage dynamic network loads and accelerate digital transformation initiatives. According to the TM Forum's August 2024 'Digital Transformation Tracker 8' report, the percentage of communication service providers that have migrated at least 50 percent of their OSS and BSS workloads to the public cloud reached 17 percent, more than doubling since 2021.

The implementation of standardized APIs and Open Digital Architecture is establishing a new paradigm for network programmability by exposing critical capabilities to external developers. This trend creates a unified framework that grants third-party applications secure access to functions like device location and quality on demand, fostering a developer ecosystem capable of building scalable services across multiple carrier networks. This interoperability eliminates bespoke integrations, significantly lowering barriers for digital innovation and allowing operators to monetize network assets beyond basic connectivity. According to the GSMA's December 2024 'GSMA Open Gateway: State of the Market' update, 67 mobile operator groups representing 75 percent of global mobile connections have joined the initiative to standardize network APIs.

Key Market Players

%li%Nokia Corporation

%li%COMPUTERIS

%li%Cisco Systems, Inc.

%li%Hewlett Packard Enterprise Company

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%li%Amdocs Group Company

%li%Suntech S.A.

%li%Infovista SAS

%li%NetCracker Technology Corporation

%li%Comarch SA.

%li%Capgemini Services SAS

Report Scope

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

%li%OSS & BSS Market, By Component

%li%%li%Service

%li%%li%Solution

%li%OSS & BSS Market, By Deployment Mode

%li%%li%On-premises

%li%%li%Cloud

%li%OSS & BSS Market, By Organization Size

%li%%li%Small- & Medium-sized Enterprises

%li%%li%Large Enterprises

%li%OSS & BSS Market, By Industry Vertical

%li%%li%IT & Telecom

%li%%li%BFSI

%li%%li%Media & Entertainment

%li%%li%Retail & E-Commerce

%li%%li%Others

%li%OSS & BSS Market, By Region

%li%%li%North America

%li%%li%%li%United States

%li%%li%%li%Canada

%li%%li%%li%Mexico

%li%%li%Europe

%li%%li%%li%France

%li%%li%%li%United Kingdom

%li%%li%%li%Italy

%li%%li%%li%Germany

%li%%li%%li%Spain

%li%%li%Asia Pacific

%li%%li%%li%China

%li%%li%%li%India

%li%%li%%li%Japan

%li%%li%%li%Australia

%li%%li%%li%South Korea

%li%%li%South America

%li%%li%%li%Brazil

%li%%li%%li%Argentina

%li%%li%%li%Colombia

%li%%li%Middle East & Africa

%li%%li%%li%South Africa

%li%%li%%li%Saudi Arabia

%li%%li%%li%UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global OSS & BSS Market.

Available Customizations:

Global OSS & BSS 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

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

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