

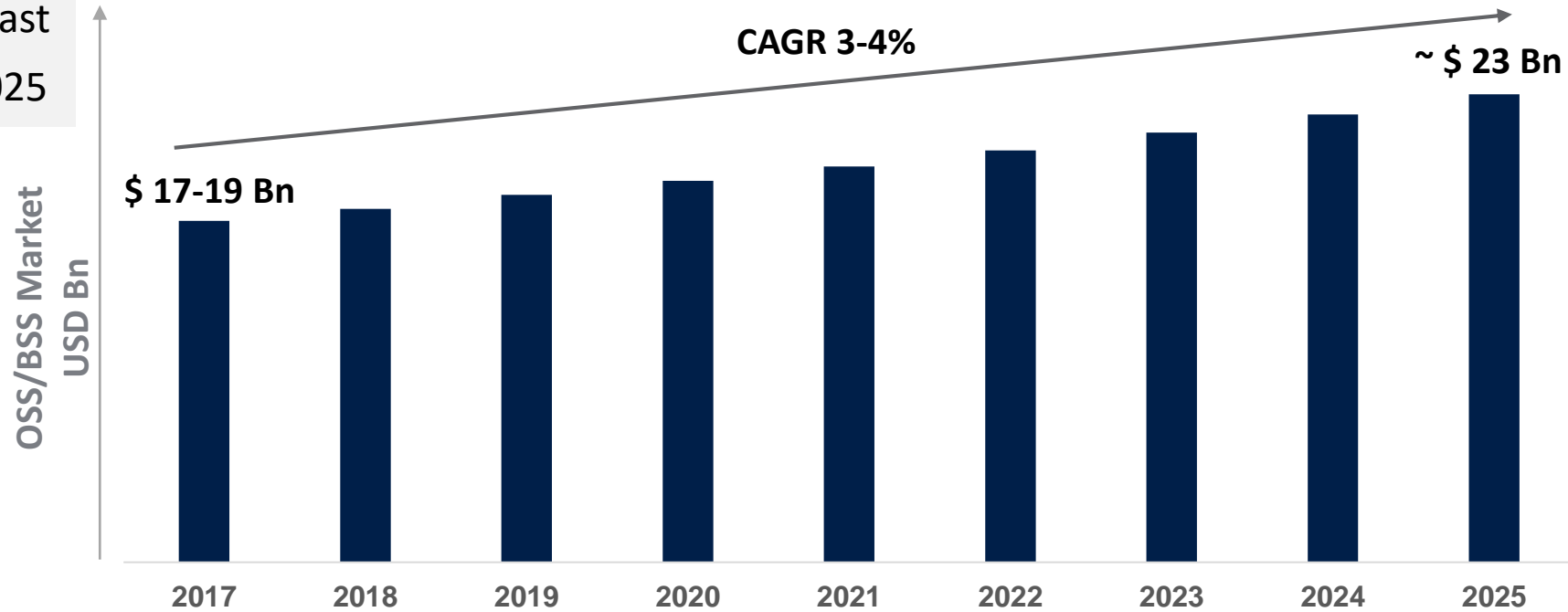


# OSS & BSS Ecosystem Analysis

2018

**Ecosystem Analysis:** OSS/BSS market stand at ~USD 18Bn in 2017 and is expected to become USD 23 Bn by 2022

OSS/BSS market Forecast  
**~USD 23 Bn** by 2025



**Evolving business models through customer centricity**  
Evolution of customer needs is driving business models to take a customer centric approach providing a seamless omnichannel experience, CX enhancement, real-time decision making, precise marketing, operational efficiency, data monetization and personalization.

**Changing Architecture**  
CSPs are increasingly adopting software based architecture along with microservices and big data technologies. This will lead to better quality products, faster time to market and improved maintenance. The architecture will provide high levels of flexibility and speed.

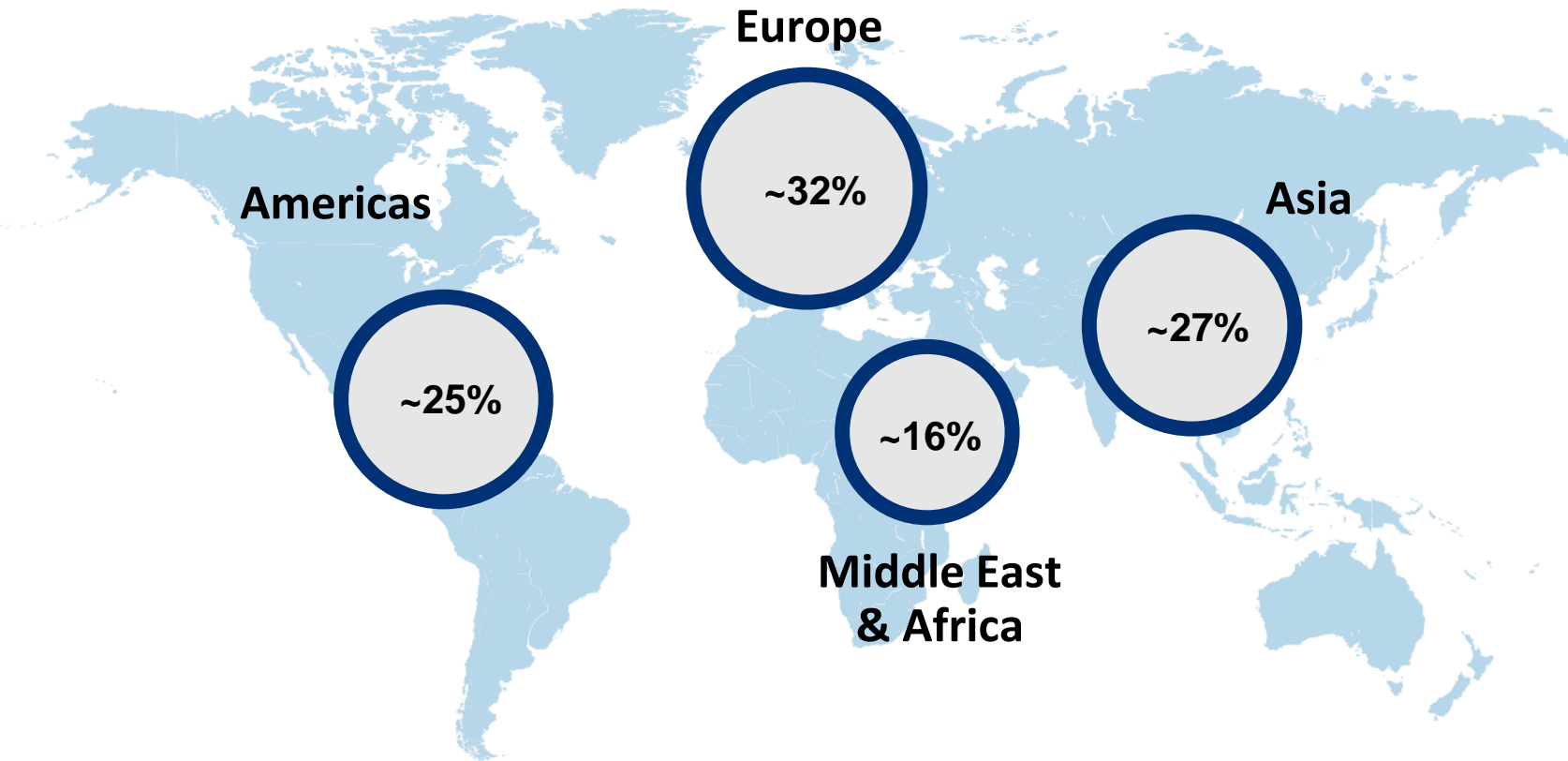
**Creating Value out of Data**  
An effective analysis of customer data along with network data will dramatically improve both internal processes and external services. Monetizing data is becoming a large focus areas with CSPs leading to growth.

**Transformation to Digital Service Providers**  
CSPs will no longer solely provide telecommunication services but rather transform into digital service providers providing a suite of services including IoT and OTT.

Note: Services Led Revenues include Software Licenses, Implementation, Integration, Managed Services, SaaS, Consulting, Maintenance.

## OSS/BSS Revenue Distribution by Geography

OSS/BSS Market Size (2017)  
**USD 17–19 Bn**



### Activities under BSS include

- Revenue Management
- Customer Management
- Product Management
- Order Management
- Analytics

### Activities under OSS include

- Network Management
  - Data Management
  - Service Assurance
  - Service Fulfillment
  - Network Design
- 
- Revenue Management hold major share (Nearly 50%) under BSS Market
  - Service Assurance (Service Application Management) holds major share (Nearly 65%) under OSS market

**Note:** Services Led Revenues include Software Licenses, Implementation, Integration, Managed Services, SaaS, Consulting, Maintenance

**Technology Service Provider**



- System Integration
- Network management
- Cloud engineering
- Big Data/analytics
- Application development/ integration/ deployment
- Testing (Functional/ Cloud/ Automation)
- COTS Implementation

**OSS/BSS system & service Providers**



The companies that function both as system and service providers are market leaders that offer very specific services such as system integration, data integration, service activation, fault management and system modernization

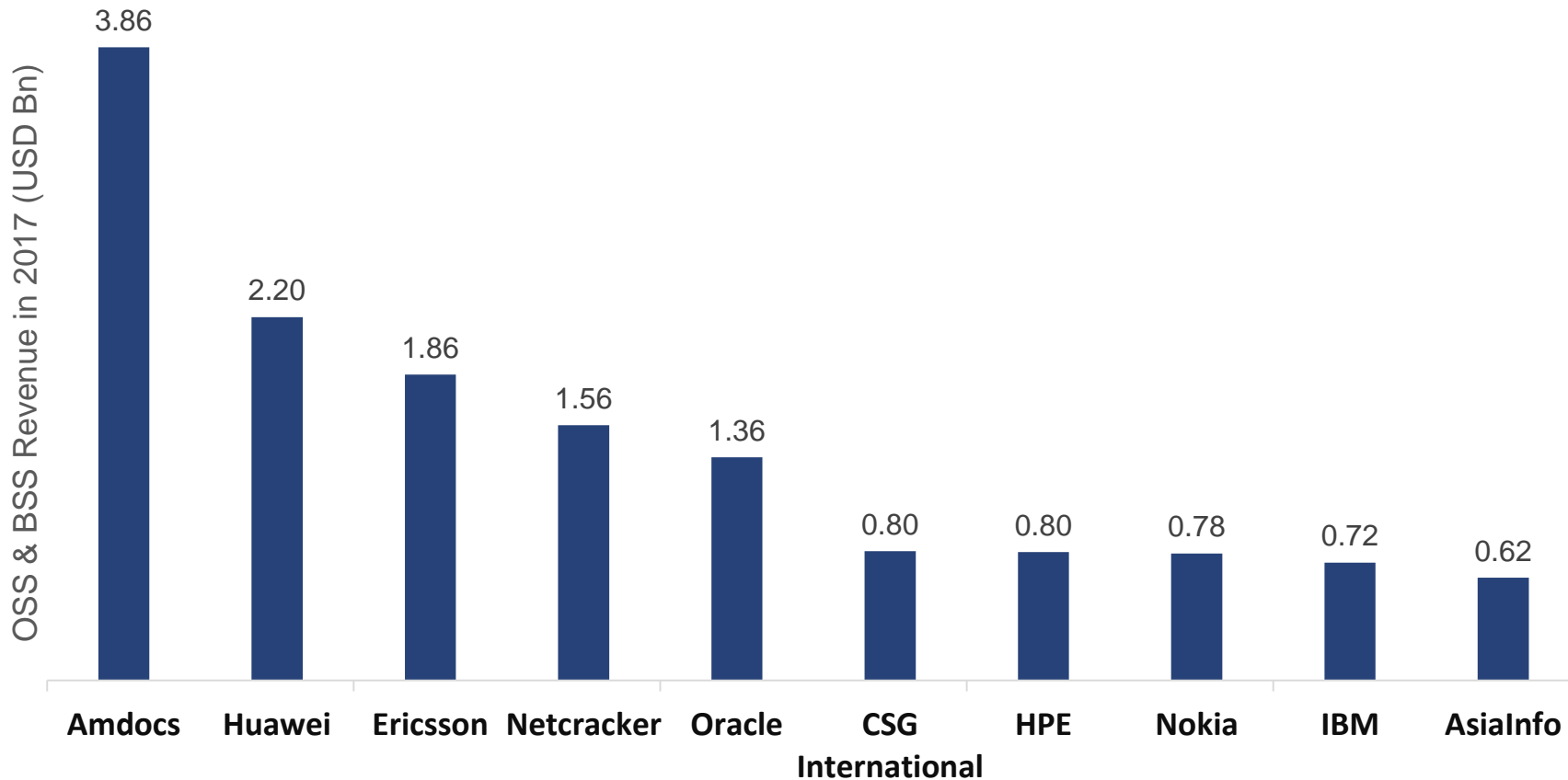
**OSS/BSS System Providers**



System providers provide end to end OSS/BSS systems that encompass network management, service fulfilment, service assurance, product management, data management, order management and revenue management.

**Market size and market share of vendors:** OSS and BSS market is majorly dominated by five vendors – Amdocs, Huawei, Ericsson, Netcracker, and Oracle

### OSS and BSS Vendor Landscape



- OSS and BSS market share is majorly dominated by the top five vendors – Amdocs, Huawei, Ericsson, Netcracker, and Oracle that accounts for 60% of the market.
- Amdocs, Ericsson, Huawei, and Netcracker function as both system and service providers
- Amdocs offers Cramer6 OSS Suite which is an end-to-end fulfillment suite
- Amdocs, Huawei, and Ericsson offers services such as billing management, revenue management, and full suite managed services which can be integrated with cloud that decreases operational costs
- Other OSS and BSS players include ZTEsoft, Apttus, BOCO Inter Telecom, TEOCO, Infovista, Optiva, Viavi, and Spirent