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.

Source: DRAUP
Market by Geography: Revenue Management and Service Assurance are majorly driving the BSS and OSS market growth

**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

**Note:** Analysis is based on the DRAUP’s proprietary engineering database and well as secondary research, updated in October 2018
## OSS/BSS Ecosystem

Amdocs and Ericsson are some of the OSS/BSS leaders playing across system and service areas.

### Technology Service Provider
- Tech Mahindra
- Accenture
- Tata
- Wipro
- Cognizant

### OSS/BSS System & Service Providers
- A+ Ventures
- Ericsson
- Huawei
- Netcracker
- Oracle

### OSS/BSS System Providers
- Nokia
- Openet
- Redknee
- Viavi
- Netscout

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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.

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

Note: Analysis is based on the DRAUP's vendor ecosystem module, updated in July, 2018.
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 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.

Note: Analysis is based on the DRAUP’s proprietary engineering database, updated in September 2018.
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