Carrier network transformation for 5G has long been underway, with NFV underpinning a number of efforts. Telcos’ lessons learned include integrating cloud-native architectures, increasing automation across all networking layers, implementing DevSecOps models, broadening partner ecosystems, and participating in open source initiatives. These investments are imperative if carriers plan to compete in the next generation of networking.

James Crawshaw
Practice Leader
HOW OMDIA HELPS YOU

• Analyze Telco Cloud strategies
• Understand carrier SDN and NFV deployment plans
• Evaluate vendor portfolio offerings to meet service provider demand for network cloudification
• Analyze service provider vendor and other strategic partner selection criteria

KEY QUESTIONS ADDRESSED

• How are Telco Cloud strategies developing?
• How much longer should service providers invest in their legacy networks?
• How can service providers make the right investment decisions, select vendors and evaluate the potential for new technologies and services?
• What are carriers’ plans to deploy SDN and NFV over the next year?
• What challenges do carriers continue to face in SDN and NFV implementations?
• How will cloud-native infrastructure and service delivery enhance service providers’ ability to compete?
• How is the telco partner ecosystem evolving, especially in the wake of telco/cloud provider partnership momentum?
Carrier Network Software: Our Expert Analysts

Kris Szaniawski
Research Director,
Service Provider Access, Software,
Transformation

James Crawshaw
Practice Leader
Service Provider Transformation
Carrier Network Software: Product Deliverables

**MARKET DATA**
—*Biannual*—
Carrier SDN Hardware, Software & Services – Forecast/Update
NFV Hardware, Software & Services – Forecast/Update

**SURVEYS**
—*Annual*—
Carrier SDN Adoption and Vendor Perception
NFV Adoption and Vendor Perception

**REPORTS**
—*Ongoing - Annual*—
Forecast reports
Trends to Watch and Strategy
Case studies

**ANALYST INSIGHTS**
—*Ongoing*—
Analyst commentary on market shifts, technology and regional developments, vendors, events, and more.

**PRESENTATIONS**
—*Ongoing*—
Analyst briefings

**ANALYST ACCESS**
—*Ongoing*—
For prompt responses to urgent and unique questions.
## Carrier Network Software: Market Data & Trackers

### Carrier SDN Hardware, Software & Services Market Tracker

Worldwide and regional market size, forecasts for the carrier SDN hardware, software, and services market and accompanying report

<table>
<thead>
<tr>
<th>DETAILS</th>
<th>COVERAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Frequency:</strong> Biannual*</td>
<td><strong>SDN-capable hardware</strong> (in-use vs. not-in-use, routers and switches, WDM, video CDNs)</td>
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<tr>
<td><strong>Measures</strong></td>
<td><strong>SDN software</strong> (orchestration and controller, network applications)</td>
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<tr>
<td>• Revenues</td>
<td><strong>Outsourced services for SDN projects</strong></td>
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<td>• Ports</td>
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<td><strong>Regions</strong></td>
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<tr>
<td>• Caribbean and Latin America (including Mexico)</td>
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### NFV Hardware, Software & Services Market Tracker

Worldwide and regional market size, forecasts, and analysis for the carrier NFV hardware, software and services market; includes VNFs, NFV use cases, and uCPE and accompanying report

<table>
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<tbody>
<tr>
<td><strong>Frequency:</strong> Biannual*</td>
<td><strong>NFV hardware</strong> (NFVI servers, storage, switches)</td>
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<tr>
<td><strong>Measures</strong></td>
<td><strong>NFV software</strong> (NFV MANO, VNF software)</td>
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<tr>
<td>• Revenues</td>
<td><strong>Outsourced services for NFV use cases</strong></td>
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<td>• uCPE units</td>
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*Annual full forecast update, mid-year selected application deep dive and mid-year forecast update
uPCE Hardware Market Tracker

Worldwide and regional market size, forecasts for the uCPE market and accompanying report

DETAILS

Frequency: Biannual*

Measures
• Revenues
• Ports

Regions
• Worldwide
• North America (US, Canada)
• Europe, the Middle East, Africa
• Asia and the Pacific (China, Japan, Rest of APAC)
• Caribbean and Latin America (including Mexico)

*Annual full forecast update, mid-year selected application deep dive and mid-year forecast update
Carrier Network Software: Reports, Surveys, and Analysis

Service Provider Surveys

Carrier SDN Adoption and Vendor Perception

**Frequency:** Annual
Survey of decision-makers at operators worldwide about SDN strategies, deployment plans, drivers, barriers, timing, applications and target network areas.

NFV Adoption and Vendor Perception

**Frequency:** Annual
Survey of decision-makers at operators worldwide about their plans and strategies for deploying NFV, including drivers, timing, use cases, and applications.

Market, Trends and Thematic reports

Carrier Network Software 2021-2022 Research Themes and Strategy

**Frequency:** Ongoing
Topical reports delving deeper into major research themes typically triggered by a major industry development.

Vendor Assessments and Case Studies

**Frequency:** Ongoing
Vendor specific analysis across key topics
### Related Content: Service Provider Networks Service Area Coverage

<table>
<thead>
<tr>
<th>Service Area Package: Service Provider Networks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Broadband Access Intelligence Service</td>
</tr>
<tr>
<td>Mobile Infrastructure Intelligence Service</td>
</tr>
<tr>
<td>Optical Components Intelligence Service</td>
</tr>
<tr>
<td>Service Provider Routing and Switching Intelligence Service</td>
</tr>
<tr>
<td>Carrier Network Software Intelligence Service</td>
</tr>
<tr>
<td>Networked Edge, 5G &amp; Transport Intelligence Service</td>
</tr>
<tr>
<td>Optical Networks Intelligence Service</td>
</tr>
<tr>
<td>Service Provider Operations &amp; IT Intelligence Service</td>
</tr>
</tbody>
</table>

### About Omdia’s Service Provider Networks Coverage

Omdia’s Service Provider Networks research services provide expert analysis and data across the complete landscape of telecoms networks, including infrastructure, software and operations. The Networks team supports the broadest coverage in the industry, from mobile access, fixed access and mobile core, to transport, microwave, routing/switching, optical networks and components. Offering specialist coverage on service providers’ own transformation, including telecoms operations and IT, carrier network software, and service provider AI, Omdia’s Networks research provides the unique ability to both deep dive into specific technologies as well as gain higher-level strategic analysis and insight.

Omdia’s Network research complements our Service Provider Consumer and Enterprise research services, enabling us to advise key vendors on their customers’ customers, and guide service providers themselves on the evolving technology supplier and partner landscape. Omdia helps both vendors and service providers assess which applications and products will drive future growth, forecast the adoption and impact of new technologies, benchmark key competitors, target customers, and select suppliers, providing a holistic view of service provider investments across the industry.

Through our coverage of mobile and broadband access and core networks, transport networks, optical networks and components, and service provider transformation, our global team of expert analysts offers unparalleled data and insight as the transformation of service provider networks gathers pace.
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**Tom Coate**
Customer Success Manager

**Kāren Dyer**
Customer Success Manager

96% of our customers rate our service as Excellent or Very Good
Omdia is a global technology research powerhouse, established following the merger of the research division of Informa Tech (Ovum, Heavy Reading, and Tractica) and the acquired Omdia technology research portfolio*. We combine the expertise of more than 400 analysts across the entire technology spectrum, covering 150 markets. We publish over 3,000 research reports annually, reaching more than 14,000 subscribers, and cover thousands of technology, media, and telecommunications companies.

Our exhaustive intelligence and deep technology expertise enable us to uncover actionable insights that help our customers connect the dots in today's constantly evolving technology environment and empower them to improve their businesses—today and tomorrow.

* The majority of Omdia technology research products and solutions were acquired by Informa in August 2019 and are now part of Omdia.