

Open RAN Operator Survey – 2026

Survey Highlights and Analysis

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In partnership with:

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Introduction

This report presents the results of Omdia's 2026 **Open RAN Operator Survey**. The survey was conducted in December 2025 and January 2026 and was open only to employees of telecom service providers that operate mobile networks. This is the sixth edition in a series of Open RAN Operator Surveys.

Key findings

- **Open RAN concepts are now embedded in the mainstream of the RAN design and operations.** Of the operator respondents, 13% say “O-RAN architecture and interfaces are strategic and actively being deployed/adhered to in our production RAN,” and 27% say “O-RAN principles are guiding our future RAN evolution.” This 40% cohort of operator respondents can be said to have meaningfully adopted open RAN. Pure-play, large-scale deployments of multi-vendor open RAN are still uncommon. However, the survey data indicates that this could be set to change as operator investment cycles and vendor product offers align over the next three years or so.
- **Operators in the 40% cohort of open RAN adopters believe they can innovate faster than their non-adopting counterparts.** Respondents in this group are more advanced in their plans to adopt advanced automation frameworks, such as agentic RAN, and (naturally) are more likely to see open RAN as an enabler for 6G and artificial intelligence (AI) RAN.
- **A critical mass of operators believes there is a viable supplier base to support open RAN deployments; however, the vendor ecosystem is not yet “thriving.”** A solid 56% believe “progress has been made” and that “open RAN now has a viable vendor ecosystem.” In the context of a flat RAN equipment market, it is encouraging

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that the majority judge there to be a solid supplier base. It is perhaps a concern that only 6% of respondents believe the “vendor ecosystem is healthy with enough suppliers for open RAN to thrive,” but a positive spin is that almost all operators would like to see more open RAN offerings and a greater selection of products and solutions.

- **With the 3GPP Release 20 studies on the 6G System Architecture and 6G Radio (6GR) underway, the question of open RAN support in 6G is highly relevant.** Almost a quarter (23%) of respondents believe open RAN will be “a cornerstone of 6G” and that the “O-RAN architecture/interfaces will be widely adopted” in 6G RAN. The most influential group, however, is the 60% that say the technology is “important” to 6G and that “although open RAN has not yet reached maturity to be our primary choice for 6G, we are committed to supporting its evolution.”
- **A majority of respondents intend to adopt the O-RAN Alliance’s Service Management and Operations (SMO) framework over the next three years.** The largest group (50%) expects to evolve their existing SON into an SMO platform for traditional and open RAN sites, which is a low risk, low disruption way to incorporate SMO functionality over time. 32% expect to deploy a new SMO platform for open RAN, and 28% expect to deploy a new SMO for both traditional and open RAN. The survey shows that RAN automation will evolve to take advantage of SMO platforms and interfaces, but that there is no dominant transition path to this goal.
- **There is strong early interest in agentic RAN for network management and automation.** The lead group of operators is the 10% that are “conducting trials or pilots.” The (naturally) much larger groups are the 48% that are “evaluating agentic RAN for future adoption” and the 29% that are “somewhat interested ... but have no current plans to implement.” Of the lead cohort of open RAN adopters, 25% are conducting trials and pilots, which arguably show how an open architecture enables faster RAN innovation.
- **AI RAN is bringing exciting new concepts to improve performance and service quality.** A small number (10%) of respondents say they are “deep into AI RAN strategy and architecture development,” and 24% have “started to develop a strategy.” This is a solid leadership cohort. The majority (55%), however, are in “desk research” mode, which is to say “interested” and “watching,” but not yet active.
- **The survey shows a close link between open RAN and AI RAN.** 12% view open RAN as “a key enabler” for AI RAN, versus 52% that say it “enhances our AI RAN capabilities, but AI will also be integrated into proprietary RAN.” Operators that have already integrated open RAN into their operations see a tighter link (26% of this early adopter cohort see open RAN as a key enabler of AI RAN).
- **A quarter of respondents (25%) think they will need a telco edge server, designed to run both RAN software and AI services at the cell site, in the next three years.** At first sight, this is an over-enthusiastic result given the rate of adoption of virtual RAN, AI

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RAN, or AI services at the edge so far. However, vendors do have prototype and pre-commercial cell-site platforms of this type in operator trials, with the first commercial offerings expected soon. It is still early for this form of edge AI architecture, but the result shows that operators are positive about the idea that their infrastructure can run network software workloads alongside end-user AI workloads. Enterprise is likely to be the first deployment domain.

- **Most respondents say 6G and AI are unlikely to drive a major sustained shift from distributed RAN (D-RAN) to centralized RAN (C-RAN); however, there is likely to be an incremental move toward C-RAN.** There is about the same level of support for “no shift” (30%) as there is to a “significant shift” (24%), and both positions seem reasonable and explainable. The largest group is the 46% that anticipate a “small shift toward C-RAN” but think “it will tend to remain a specialist application (e.g., for dense urban scenarios).” This feels like the safe bet option and probably the most likely scenario.
- **The lead cohort of respondents that have already integrated open RAN in their operations is more favorable toward C-RAN—of this group, 39% see a “significant shift.”** This again illustrates how open RAN can give operators greater flexibility and, arguably, a stronger ambition to adopt new innovations faster.

Survey background

The **Omdia Open RAN Operator Survey – 2026** shows responses from 83 to 90 qualified individuals working for telecom service providers with mobile network assets. Only respondents that self-identified as knowledgeable about their company’s RAN strategy are included in the final responses.

The questionnaire was jointly developed by Omdia and project sponsors 1Finity and Qualcomm. It was fielded globally in December 2025 and January 2026.

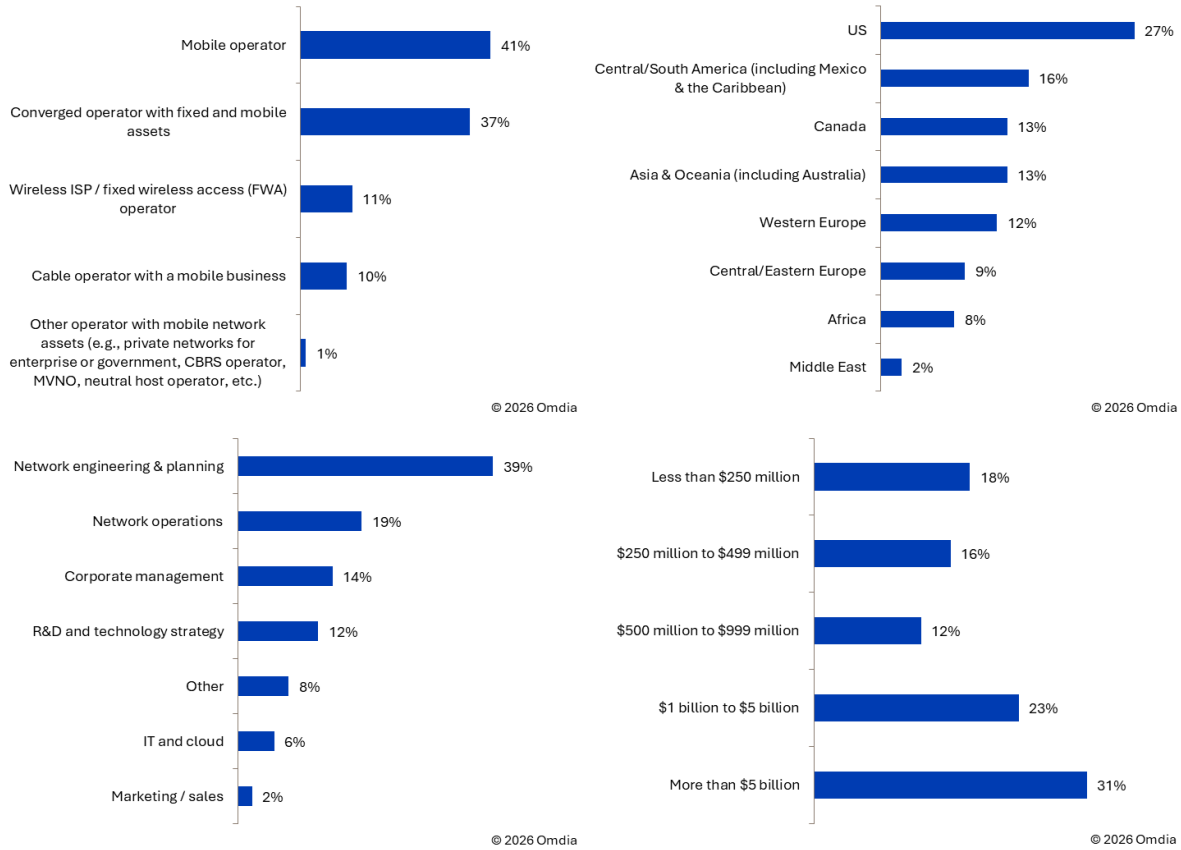
Responses are confidential and are only presented in aggregate form. Omdia does not share individual or company names from the survey response.

Survey demographics

Figure 1 shows respondent demographics. In terms of company type, 41% work at a mobile operator and 38% work at converged operators with fixed and mobile assets. The US is the single largest country represented with 27% of the response, followed by Canada at 13%. A majority of respondents are in technical roles, with 39% in network engineering and planning and 19% in network operations. Larger operators with more than \$5bn in annual revenue (31%) predominate in the response.

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Figure 1: Survey response demographics



Notes: Numbers in figures throughout this report may not total 100 due to rounding. (n=90)

Central/South America includes Mexico & the Caribbean.

Source: Omdia

Open RAN market sentiment

The O-RAN Alliance was created in 2018, and the minimum viable product (MVP) specifications were first published in 2020. The intervening years have seen open RAN characterized by hope, hype, hard work, success, and the odd high profile failure. It is therefore useful to understand market sentiment toward ecosystem maturity and to investigate the extent to which open RAN technology, architecture, and interfaces are integrated into real-world commercial networks.

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Architecture and interface adoption

Figure 2 shows the extent to which respondents say multi-vendor open RAN is integrated into their company's RAN planning and operating model. The results indicate that open RAN concepts are now embedded in the mainstream RAN market, which signals that a key success threshold has been achieved. Yet, pure-play, large-scale deployments of multi-vendor open RAN are still uncommon.

A small group (13%) says the technology is “strongly integrated – O-RAN architecture and interfaces are strategic and actively being deployed/adhered to in our production RAN.” Open RAN is not (yet) a runaway success, but this represents a leadership group.

More significantly, there are signs that open RAN is now embedded in operator thinking and the wider RAN technology landscape. The debate is how deeply and in what form the integration takes. A solid 27% say “integrated – O-RAN principles are guiding our future RAN evolution.” This 27%, combined with the 13% leadership group, creates a 40% cohort of operators that can be said to have meaningfully adopted open RAN.

At times in this analysis, the report compares this 40% cohort that has integrated open RAN with responses from the rest of the industry. In several cases, this comparison shows open RAN adopters feel more able to innovate faster than their counterparts.

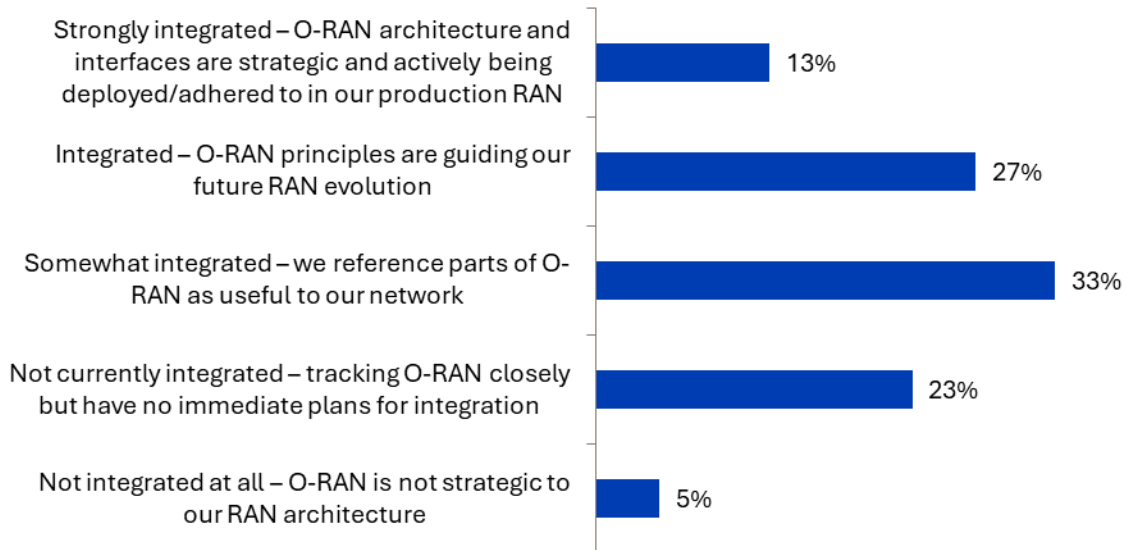
The 33% that say open RAN is “somewhat integrated – we reference parts of O-RAN as useful to our network” are clearly less committed but nevertheless see it as part of their RAN tool set. Even in this cohort, open RAN is having an influence.

Based on these results, it seems fair to say that open RAN now impacts how commercial RANs operate. It is reasonable to speculate that it will become more important in the future.

Larger North American operators with revenue above \$5bn are more bullish than the wider survey group, with 19% “strongly integrated” and a large 63% “integrated.” This latter group of 63% is important to the future of open RAN. These respondents work at operators that use the technology and get value from it, but may not have pure-play multi-vendor open networks. Using parts of open RAN in a commercial context to serve end-user customers shows how pragmatism rules over purity.

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Figure 2: To what extent is multi-vendor open RAN integrated into your company’s RAN planning/operating model?



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n=88

Source: Omdia

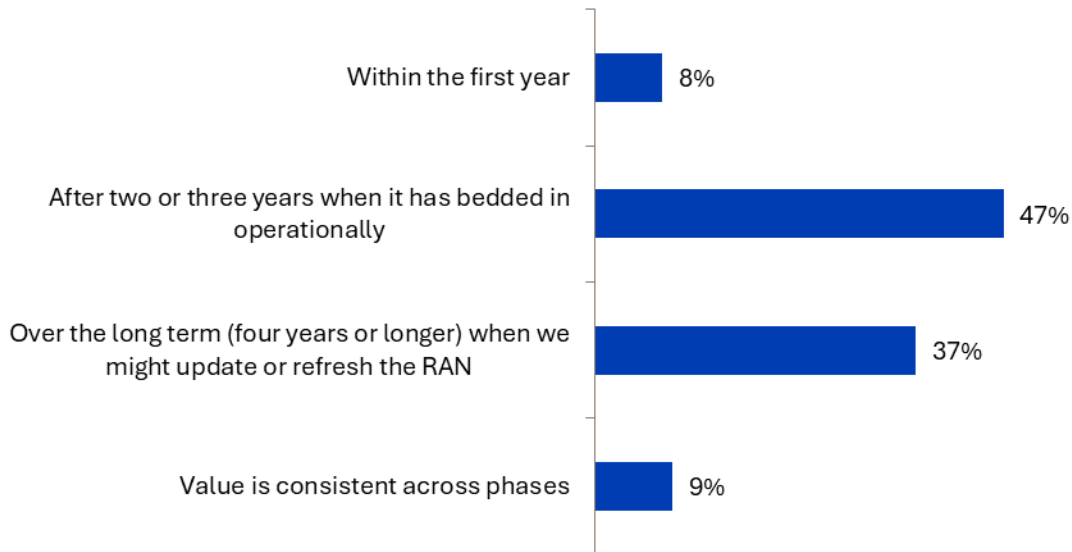
Time to value for open RAN

Open RAN is necessarily disruptive to RAN design. This means that planning and operations, and the benefits of adoption, take some time to become clear. **Figure 3** shows that about half of the survey base (47%) think it takes two to three years of operation for the value of open RAN to become apparent (i.e., when the technology has “bedded in operationally”). A solid 37% think it takes longer to see the full value of open RAN—perhaps four years or more “when we might update or refresh the RAN.”

Add in the design and planning phases that precede deployment, and it becomes clear that operators think about open RAN as a long-term investment that has the potential to be transformative. This realistic and pragmatic perspective on value and timelines helps frame analysis of the open RAN market.

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Figure 3: When do you think open RAN adds most value?



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Source: Omdia

Vendor landscape

The health of the technology ecosystem supplying open RAN systems is critical. This ecosystem drives product volumes and price competitiveness and is a key factor in supply chain stability—and, therefore, in network resiliency. Mobile operators need stable suppliers that can invest in R&D and support them over the long term.

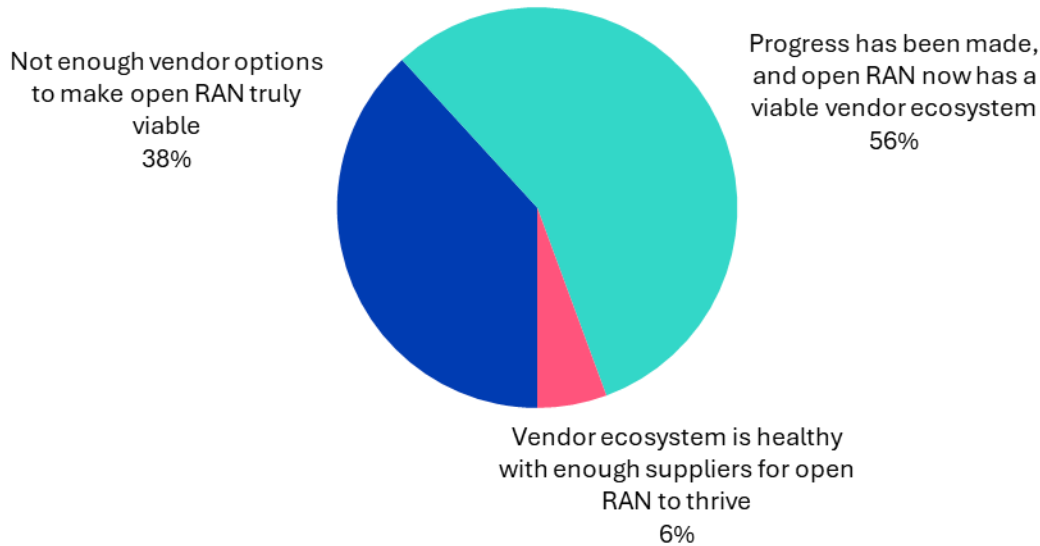
In principle, open RAN encourages specialization and best-of-breed technology, meaning more companies can innovate and thrive. In practice, vendors need a certain level of sales to stay in the market.

The survey asked operators to assess the maturity of the open RAN ecosystem. A majority (56%) believe “progress has been made, and open RAN now has a viable vendor ecosystem.” In the context of a flat RAN equipment market, it is encouraging that the majority judge there to be a solid supplier base.

There is perhaps a concern that only 6% of respondents believe the “vendor ecosystem is healthy with enough suppliers for open RAN to thrive.” A positive view of this result is that almost all operators would like to see more open RAN offering a greater selection of products and solutions. At the same time, this data point identifies a risk that vendors with shorter-term revenue and profit expectations may exit the market.

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Figure 4: How do you rate the maturity of today’s open RAN vendor ecosystem and the availability of O-RAN compatible solutions?



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n=89

Source: Omdia

Distributed unit and radio unit product maturity

Another view of the ecosystem relates to open RAN product maturity. Operators want to support vendors, but they need products that meet their performance and feature requirements. **Figure 5** asks about product maturity across distributed unit (DU) and radio unit (RU) functions. Broadly, the story is that the sector is “getting there” but with room for improvement.

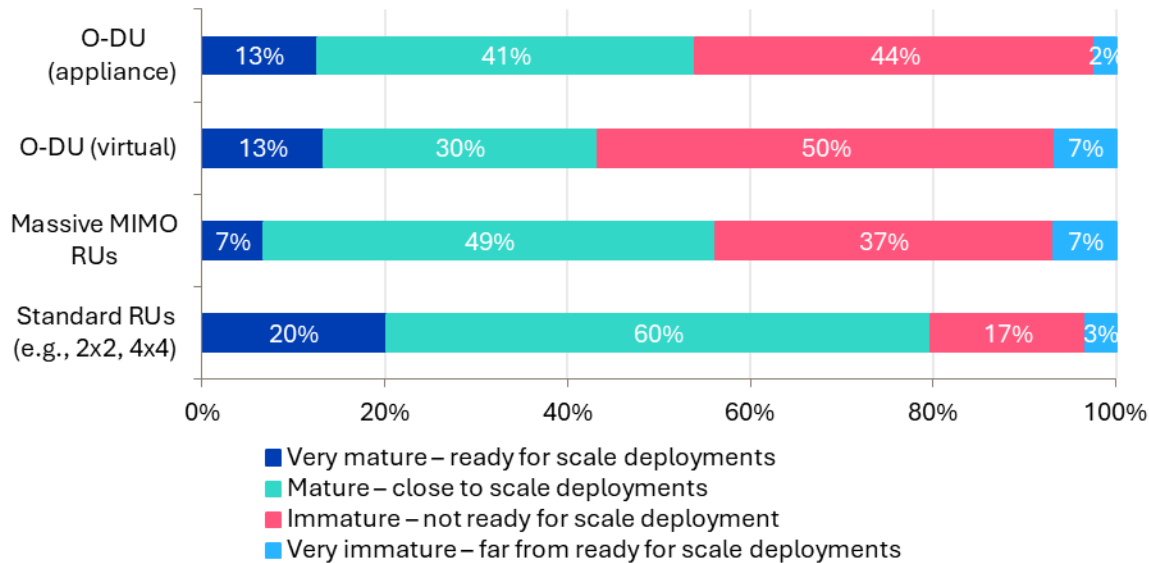
In terms of open RUs (O-RUs), a solid 20% now believe “standard RUs” (i.e., with 2x2 or 4x4 MIMO) are “very mature” versus just 7% for massive MIMO. In the “mature – close to scale deployments” category, the scores jump to 60% and 49%, respectively.

For baseband, both appliance-based and virtual open DU (O-DU) score 13% for “very mature.” This finding indicates that this critical function is underdeveloped from the operator perspective.

It is certainly the case that some new entrant and challenger vendors have offered open RAN products that simply are not at the level required by operators, and this has dented confidence in some cases. At the same time, class-leading vendors are delivering open RAN products that can be deployed at scale in multi-vendor RANs and, in some cases, are genuinely best-in-class.

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Figure 5: How mature are open radio unit (O-RU) and open distributed unit (O-DU) products?



n=90
Source: Omdia

Looking ahead to 6G open RAN

The O-RAN Alliance was formed toward the end of the first 5G standards release. As such, open RAN has been in a race to catch up with operator investment and deployment cycles.

One commonly held view is that if O-RAN Alliance architectures and interfaces can be aligned with 3GPP 6G standards development, then perhaps there would be a greater, more deeply integrated role for open RAN in 6G. In this worldview, 6G would be “open RAN native.”

This is a highly relevant issue now that work has started in 3GPP Release 20 on the 6G System Architecture and 6G Radio (6GR) studies. The O-RAN Alliance and 3GPP have a liaison agreement to work on alignment between the two organizations.

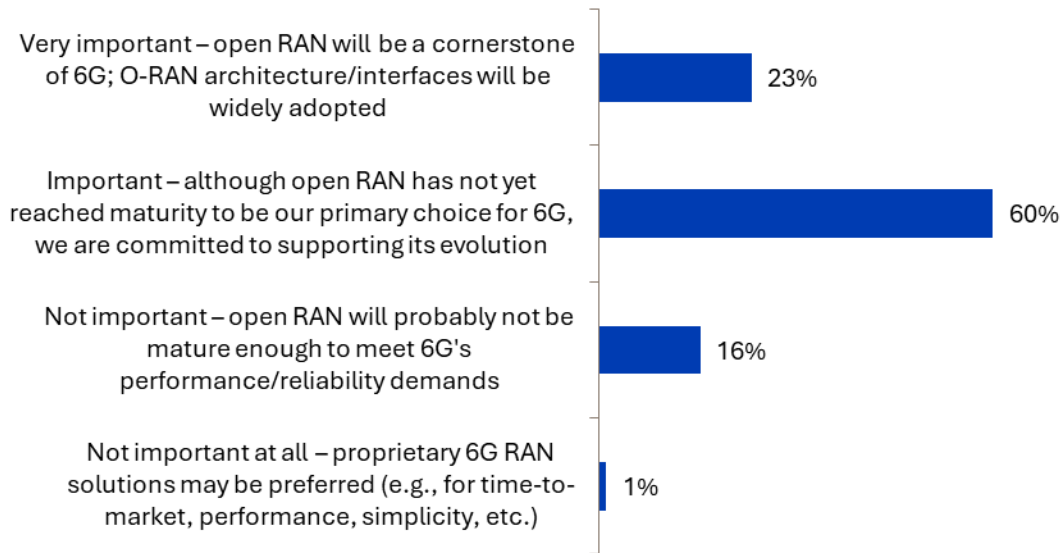
With the understanding that operators likely do not have a crystal-clear view today, the survey nevertheless sought to gauge the temperature on this important issue. For open RAN to succeed long term, it needs operators to back it in the 6G standards development process.

The survey result on open RAN for 6G is positive. Almost a quarter of respondents believe open RAN is “very important” (23%) to the 6G RAN architecture. Of the cohort of lead open RAN adopters, this figure jumps to 40%.

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The most influential group is the 60% that say the technology is “important” to 6G, and that although “open RAN has not yet reached maturity to be our primary choice for 6G, we are committed to supporting its evolution.” The voices of these supportive operators will be needed to provide decisive backing for open RAN in 6G in standards and specifications forums.

Figure 6: Looking ahead, how important will open RAN be to 6G?



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Source: Omdia

RAN automation

With the SMO framework, which incorporates the RIC, the O-RAN Alliance architecture introduces a new approach to RAN automation. The intent is to enable multi-vendor control of RAN functions over standard interfaces using well-specified data models. Conceptually, the idea is similar to C-SON (centralized self-organizing networks), but better standardized, more sophisticated, and with greater scope to extend to new functionality.

C-SON and SMO on a three-year view

The survey asked how C-SON and SMO would play in operators’ RAN automation strategies over the next three years. The options shown in **Figure 7** are not mutually exclusive, and survey-takers on average responded 1.5x each. It is perfectly logical, for example, for an operator to maintain an existing SON platform and introduce a new SMO platform.

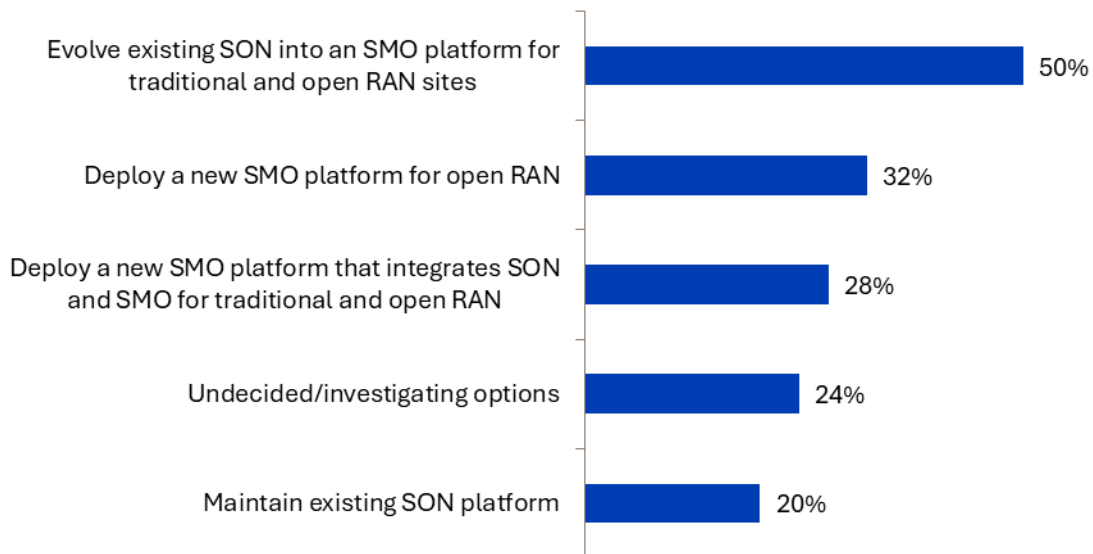
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The largest group (50%) says it expects to evolve its existing SON into an SMO platform for traditional and open RAN sites. This is a low risk, low disruption way to incorporate SMO functionality over time.

Among larger North American operators, the “deploy a new SMO platform for open RAN” and “deploy a new SMO platform that integrates SON and SMO for traditional and open RAN” both jump to 44%.

The key takeaway is that most operators aim to incorporate SMO into their networks over the next three years, but there is no dominant transition path. RAN management and automation will evolve to incorporate SMO, but a mixture of approaches will prevail.

Figure 7: What is your organization’s plan for RAN automation over the next three years? (Select all that apply)



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n=90

Source: Omdia

Multi-vendor support in RAN automation

The survey wanted to understand how important multi-vendor support is for RAN automation platforms (i.e., the ability to control RANs from more than one vendor using an independent automation/SMO vendor). Broadly, operators value multi-vendor support, but only 21% say it is “critical.”

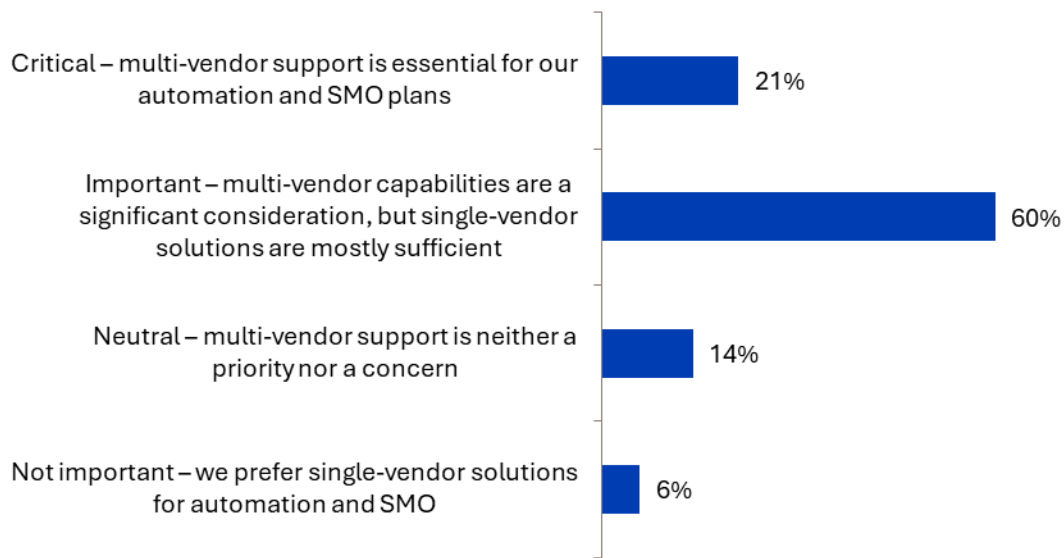
A larger 60% clearly want multi-vendor capabilities but acknowledge they may not need it or may have to settle for something less. This perhaps reflects that classic RAN automation platforms often use a mixture of C-SON and network management systems (NMS) provided

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by the RAN vendor, combined with various monitoring and analytics tools. The mostly single vendor model is more familiar and often simpler to implement and operate.

There are, however, sophisticated operators that already use multi-vendor RAN automation. Based on this survey response, Omdia anticipates multi-vendor capabilities will become more important than they have been in the past.

Figure 8: How important are multi-vendor RAN network capabilities to your organization’s RAN automation/SMO strategy?



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Source: Omdia

Agentic AI for RAN automation

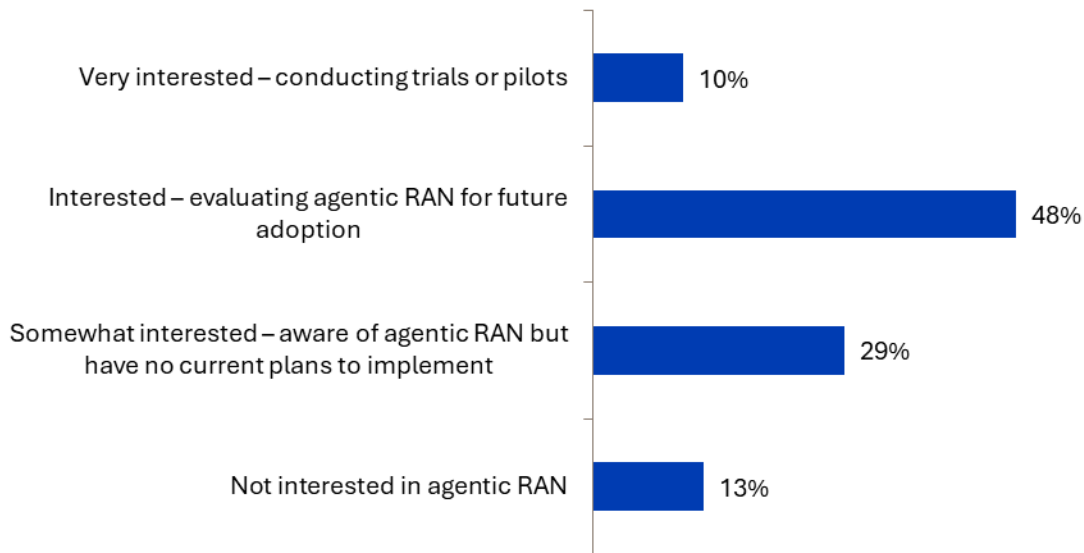
Agentic AI is one of the hottest topics in network automation. The idea is that AI agents can combine to perform multi-step reasoning to automate complex tasks, such as correlating logs, topologies, and configurations, in order to optimize a process or service. It is a high potential technology that, in principle, is ideally suited to address the complexity and diversity of data sources, tools, and processes in RAN operations. Yet, agentic AI is not yet ready for use in national mobile networks, where stability and reliability are critical.

The survey shows strong interest in agentic RAN for network automation. The lead group is the 10% of respondents that are “conducting trials or pilots.” The (naturally) much larger groups are the 48% that are “evaluating agentic RAN for future adoption” and the 29% that are “somewhat interested ... but have no current plans to implement.”

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Of note, the lead cohort of operators that have already integrated open RAN are more advanced in their thinking on agentic RAN (25% are conducting trials and pilots). This result may indicate that open RAN really does enable faster innovation.

Figure 9: Thinking about the next 12 months, what is your organization’s level of interest in adopting agentic RAN frameworks for network management?



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n=87

Source: Omdia

Toward autonomous 6G RANs

There is a widespread desire to move from automation of discrete, but interrelated, manual processes in 4G/5G networks to natively autonomous 6G networks. RAN automation and autonomy are only partially addressed by 3GPP (much of automation is considered implementation-specific). Potentially, the O-RAN architecture can help fill that gap.

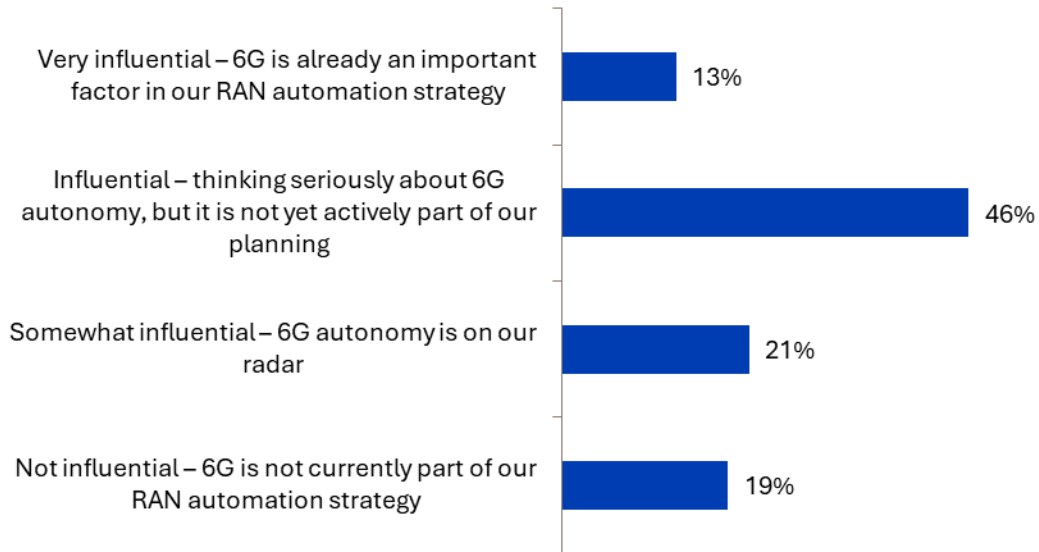
The first release of 6G specifications is not due until April 2029 at the earliest. The survey, nevertheless, asked if the potential for autonomous 6G networking is already influencing operators’ RAN automation strategies. The short answer is yes, but as expected, it is in the early phases. The largest group is the 46% that say they are “thinking seriously about 6G autonomy, but it is not yet actively part of our planning.”

Given the long timescales of networkwide technology transitions, it appears that operators have a continuous-evolution mindset to their automation strategy that will bridge the 5G transition through to early 6G. It is likely, for example, that the data frameworks operators

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are developing for AI networking initiatives today will, in some form, also support the introduction of 6G.

Figure 10: To what extent is the potential for autonomous 6G networking already an influence on your RAN automation strategy?



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n=84

Source: Omdia

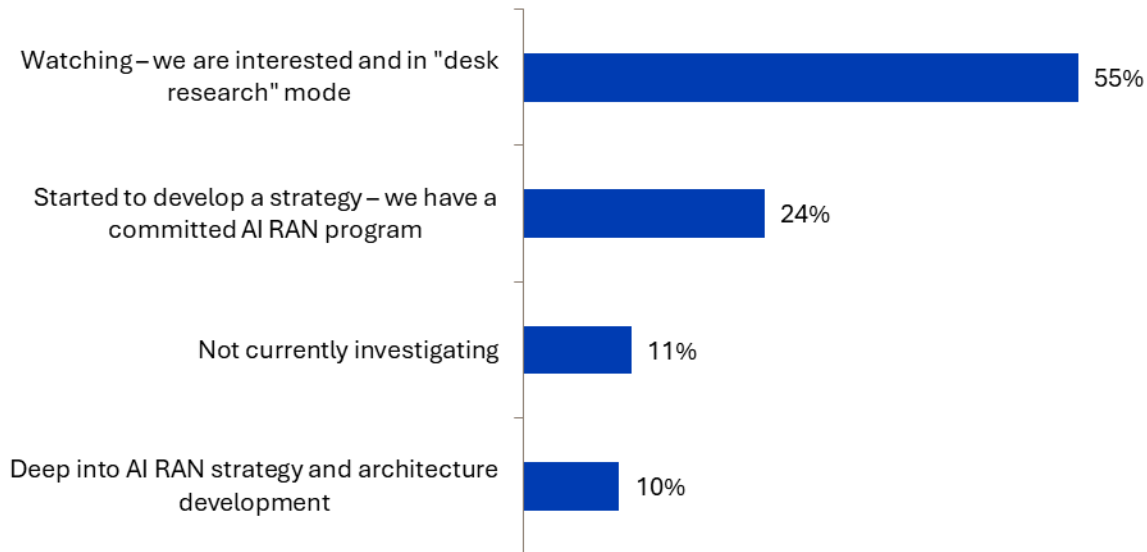
Open RAN and AI RAN

Open RAN is arguably moving into the productivity phase, and the industry’s focus is on the hard, unglamorous work needed to deliver practical value. AI RAN is the new hot technology, introducing exciting concepts that may one day underpin a new era of RAN. It is thus appropriate to ask about AI RAN (note that the term “AI RAN” is not yet well-defined and can be interpreted quite broadly).

A small number (10%) of respondents say they are “deep into AI RAN strategy and architecture development,” and 24% have “started to develop a strategy.” This is a solid leadership cohort. The majority (55%), however, are “in “desk research” mode, which is to say “interested” and “watching,” but not yet active.

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Figure 11: What is the level of attention on AI RAN at your company?



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n=83

Source: Omdia

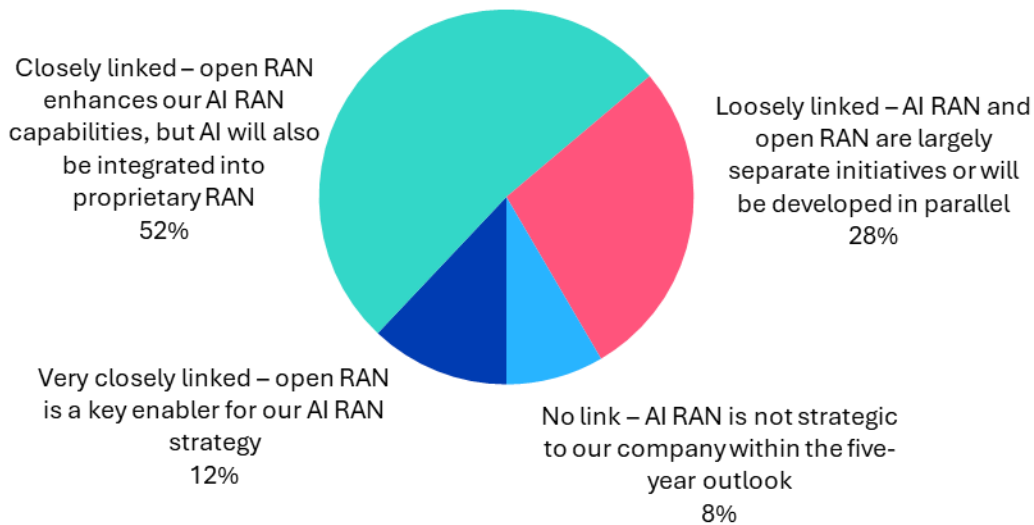
Open RAN enables AI RAN

The survey (**Figure 12**) shows a close link between open RAN and AI RAN, but the relationship is not watertight. A modest 12% view open RAN as “a key enabler” for AI RAN versus 52% that say it “enhances our AI RAN capabilities, but AI will also be integrated into proprietary RAN.”

As before, the operators that have already integrated open RAN into their operations see a tighter link (26% say open RAN is a “key enabler” for AI). In general, given the common technology reference points and given that the leading AI for RAN advocates are strong supporters of open RAN, Omdia expects to see a cross-fertilization of the two concepts.

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Figure 12: In the next three years, how closely linked will AI RAN and open RAN be at your company?



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n=83

Source: Omdia

Edge AI RAN servers

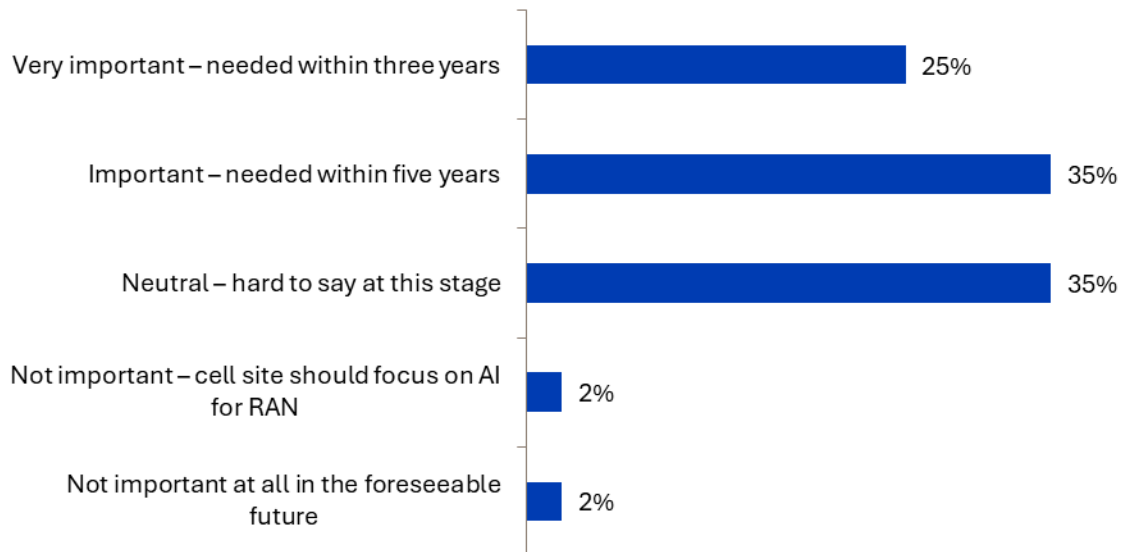
A quarter of respondents (25%) say they think their company will need a telco edge server designed to run both RAN software and AI services within three years. This is, at first look, a more enthusiastic result than expected, given the rate of adoption of virtual RAN, AI RAN, or AI services at the network edge.

However, vendors do have prototype and pre-commercial cell-site platforms of this type in operator trials, with the first commercial offerings expected soon. Smaller-scale pilots or deployments at venues such as stadiums or in enterprise contexts are likely to be the first examples of this model.

It is still early for this form of edge AI architecture, but the result shows that operators are positive about the idea that their infrastructure can run network software workloads alongside end-user AI workloads. Hosting AI applications at the network edge is a development to track closely.

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Figure 13: Thinking about AI RAN at the cell site, how important will it be for a telco edge server to be designed to run both RAN software and AI services?



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Source: Omdia

Centralized RAN for 6G and AI

Each new “G” introduces a new RAN architecture, creating an opportunity to rethink the balance between distributed and centralized functions. In 6G, the edge computing narrative combines with the idea that AI workloads may benefit from being deployed close to the user and colocated with C-RAN functions at a hub site (rather than at the cell site, as discussed above). It is a speculative but interesting and topical idea to test in the survey.

Figure 14 shows that most respondents do not expect a major sustained shift from D-RAN to C-RAN. There is about the same level of support for “no shift” (30%) as for “significant shift” (24%), and both positions seem reasonable and explainable.

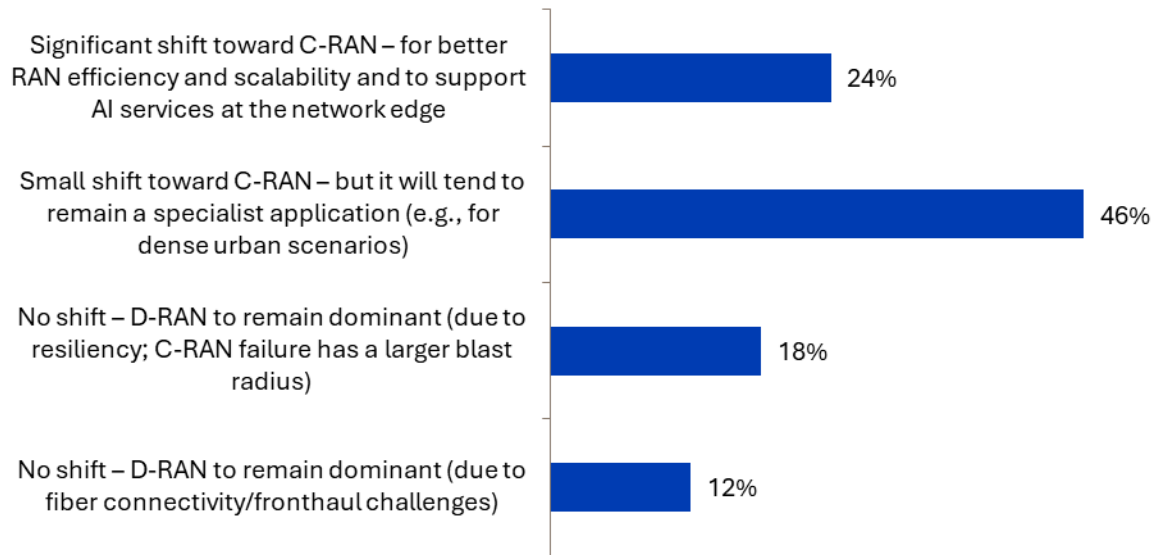
The key group is the 46% that anticipate a “small shift toward C-RAN” but think “it will tend to remain a specialist application (e.g., for dense urban scenarios).” This feels like the “safe bet” option and probably the most likely scenario. As things stand, it would take a major evolution of the AI application domain to force a radical change to a centralized RAN topology.

At the same time, C-RAN deployment is increasing incrementally worldwide, especially in fiber-rich urban scenarios. In 6G radio discussions, there are also proposals (e.g., for joint transmission) that may favor centralization. In this context, the 24% that anticipate a bigger shift to C-RAN may turn out to be pioneers of a larger transition that emerges later. Certainly, this is an area to watch.

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It is worth noting that the operators that have already integrated open RAN in their operations are quite a bit more favorable toward C-RAN (39% see a significant shift). This again underlines how open RAN can give operators greater flexibility and ability to adapt.

Figure 14: In the outdoor macro network, with the advent of 6G and AI services at the edge, does your company expect a significant shift toward centralized RAN (C-RAN) architecture and away from distributed RAN (D-RAN)?



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Appendix

Methodology

This report and its findings are based on a survey of individual professionals that work at telecom service providers that own and operate mobile networks. Omdia developed the questionnaire in collaboration with project sponsors 1Finity and Qualcomm, and the survey was fielded globally in December 2025 and January 2026. In addition to working at a company with mobile network assets, respondents had to self-certify as being knowledgeable about their company's RAN strategy to qualify. After reviewing all submissions, 83–90 respondents were deemed to be qualified participants.

This is the sixth edition of the **Open RAN Operator Survey** (which was previously known as Heavy Reading's Open RAN Operator Survey). Earlier editions are linked in the **Further reading** section below.

Further reading

[*Heavy Reading's 2024 Open RAN Operator Survey*](#), Omdia (October 2024)

[*Heavy Reading's 2023 Open RAN Operator Survey*](#), Omdia (April 2023)

[*Heavy Reading's 2021 Open RAN Operator Survey*](#), Omdia (November 2021)

[*Heavy Reading's 2020 Open RAN Operator Survey*](#), Omdia (November 2020)

[*Heavy Reading's 2018 Open RAN Operator Survey*](#), Omdia (September 2018)

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We create business advantage for our customers by providing actionable insight to support business planning, product development, and go-to-market initiatives.

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