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Author:
Wally Swain

Driving MNO Revenue with RCS for Business

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Contents

Summary

RCS for Business connects enterprises to their customers through images, interactivity, and secure communications. Mobile network operators (MNOs) sit at the center of this opportunity, and this whitepaper will help you take advantage of it.

The growth of over-the-top (OTT) applications has been the bane of telecom companies' existence for the past decade. Telcos build and pay for the network, while OTTs monetize applications that ride on that infrastructure. Even voice and SMS, the bedrock, profitable applications that defined mobile services for decades, are bypassed for free on telco mobile internet services using OTT messaging apps.

According to the GSMA, rich communication services (RCS) represent a standards-based set of capabilities that "modernizes traditional SMS messaging by introducing features like group chats, file sharing, and read receipts," providing a more interactive and engaging messaging experience through the default mobile messaging app.

Because RCS capability sits at the core of the mobile network, it puts the telco back at the center of the mobile user's experience, a position usurped in most markets by social networking–based apps like WhatsApp or Facebook Messenger, at least for person-to-person (P2P) SMS.

App-to-person (A2P) SMS, which businesses use to communicate with their customers, so far, remains a secure and lucrative source of revenue for MNOs. However, that cash flow is also under attack as OTTs look to monetize their heretofore free messaging platforms. With mobile users already using OTT messaging apps for P2P communication, receiving and sending messages to the businesses they deal with seems like a natural extension.

RCS provides an equivalent customer experience to OTT messaging apps on the telcos' native platform. However, some MNOs sought to avoid revenue erosion of SMS by delaying the full deployment of RCS. That strategy has only given the OTT players more time to develop and market their own solutions.

The delay tactic did have a certain logic because, for many years, RCS was only available on Android devices (5.0 or higher). P2P and A2P SMS are inherent capabilities of all 3GPP-compatible phones, but so is the mobile internet that OTT messaging services ride on. While RCS was restricted to Android, its reach neither competed with the OTTs nor substituted for SMS.

Apple devices with iOS 18 now fully support RCS, opening this opportunity to all smart devices, making them more attractive to both P2P and business customers and improving the business case for MNOs.

However, telcos still face one limitation and one weakness when competing against OTT messaging apps for the A2P business.

The weakness is operators' lack of advertising and marketing resources to support businesses that want to leverage RCS capabilities. Telcos also often lack the development skills to build high-leverage mobile marketing campaigns. At the very least, they cannot

maintain such skills in all industry verticals. Business clients, however, can access a broad number of developers experienced with apps on major OTT platforms.

The limitation to a single mobile operator offer would restrict “coverage.” Even the leading telco in a market will have a 50% share at best, meaning that go-it-on-your-own A2P RCS solutions can only cover half of its business customer’s clients. The corresponding OTT solution would have 100% coverage—at least 100% of those using the OTT app.

The answer to both these challenges is partnering—building a vibrant developer ecosystem to bring innovative A2P RCS solutions to a mobile operator’s business clients. Encouraging RCS in other telcos and jointly promoting RCS adoption by mobile users will build value together.

Telcos must also lead by example, using RCS for their own marketing and customer experience interactions. Doing so builds end-user familiarity with RCS messaging and demonstrates impact to enterprise clients.

The telco business case for RCS for Business

What is RCS?

RCS brings a standards-based set of capabilities to mobile communications that “modernizes traditional SMS messaging by introducing features like group chats, file sharing, and read receipts,” providing a more interactive and engaging messaging experience through the mobile-native messaging app. See the box below.

What makes rich communication services “rich”?

- Video, carrousels, social-network like interface, file and location sharing, receipt and read status
- Verified sender
- Greater coverage: all Android 5.0+ and iOS 18 smart devices
- Interactivity and Quick Action buttons to engage with millennials and Gen Z
- Branded messages
- Secure financial transactions
- No app to download—the power of an app with the simplicity of text messaging
- Direct interaction with phone features like calling, calendar, and GPS / maps

SMS has been around for over thirty years, and it is one of the cornerstones of the mobile experience. Deeply embedded in the standard mobile protocols, SMS and its “multimedia” cousin, MMS, reside on virtually any type of phone, on any generation from 2G to 5G.

However, the rise of OTT messaging apps like Facebook Messenger (2008), WhatsApp (2009), or iMessage (2011) raised the customer experience bar, offering features like send / receive confirmation, presence, and interactive multimedia messaging. These apps are “free” for those with a smartphone, a data plan, or even just WiFi. For business customers, they offer reach and features like picklists and chatbots.

They use mobile internet services, but otherwise, these apps bypass the mobile operator completely.

Recognizing the threat, MNOs and vendors worked with the GSMA to implement these advanced features and more in 3GPP, the mobile communications standard. By 2017, the GSMA published the first Universal Profile: “a single, industry-agreed set of features and technical enablers developed to simplify the product development and global operator deployment of RCS.” Today, RCS provides messaging features that meet the OTT challenge and go beyond.

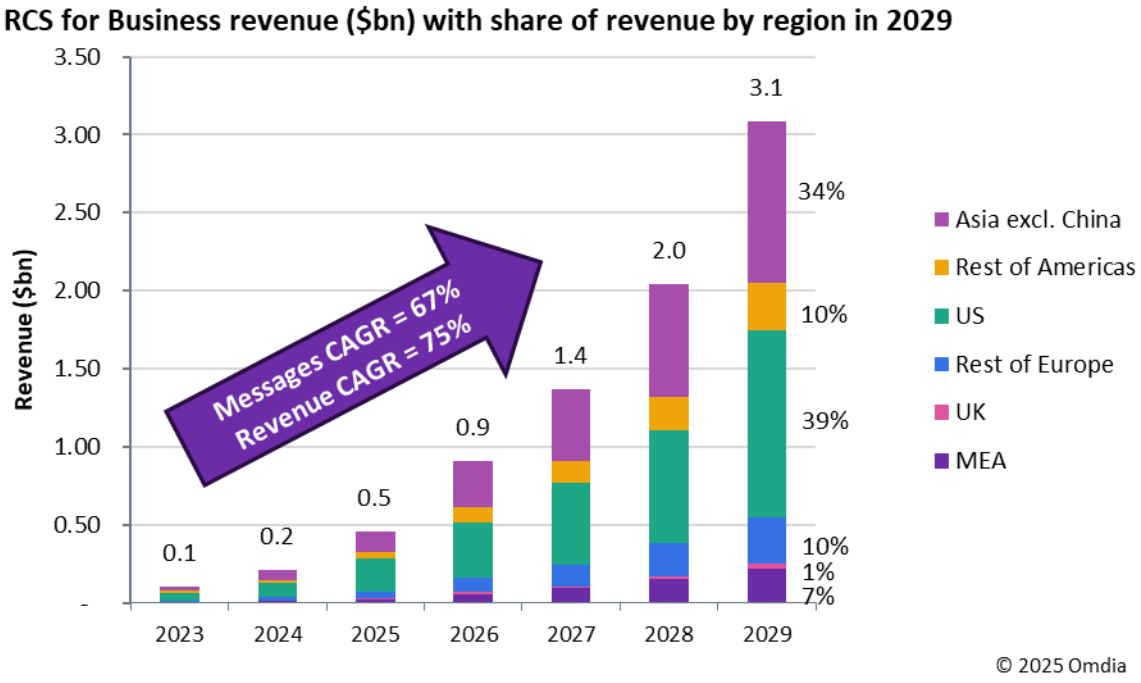
RCS for Business (also referred to as A2P RCS) leverages these features, so business customers everywhere can reach mobile smartphone users with more vibrant marketing messages, interactivity and, importantly, confidence that the sender is who they say they are.

Sizing the RCS for Business opportunity

To understand the MNO opportunity in messaging and RCS in particular—and the competitive threat from OTT messaging apps—it helps to separate the P2P and A2P markets. OTT messaging apps dominate the P2P market with 96% of traffic in 2025, and while Omdia expects the RCS features to attract some traffic share, that will not affect the OTTs’ relative position. Furthermore, Omdia believes operators will be unable to charge for P2P RCS because of the OTTs’ strength. Free RCS will, however, encourage usage and support A2P applications.

A2P RCS—that is, RCS for Business—presents strong growth in both messages and revenue.

Figure 1: RCS for Business: Traffic and revenue will double every 16 months



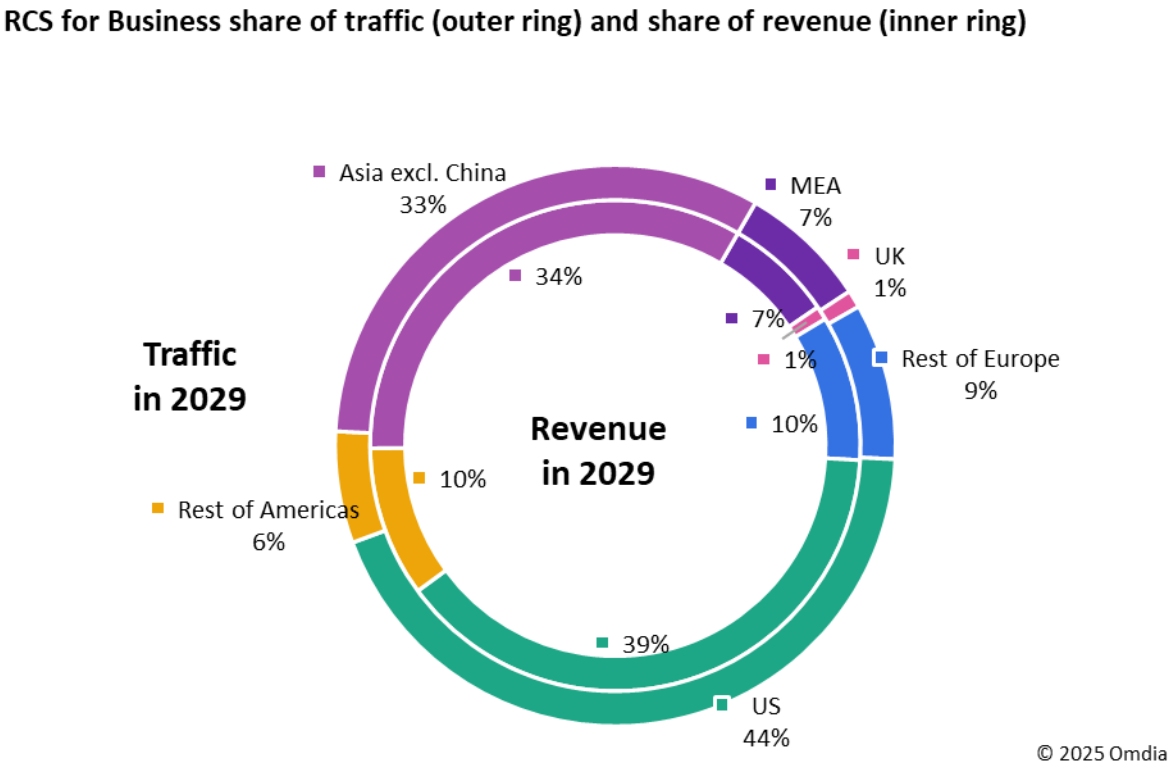
Source: Omdia

By region

- The **United States** is by far the largest and most advanced market today, but it is still doubling every 16 months through 2029.
- **Asia, excluding China,** is the second largest based on its size, purchasing power, and penetration of Android devices.
- We project the **Rest of America** to have a lower-than-expected RCS revenue compared to the population because of lower purchasing power in Latin America.
- A later start puts **Europe** behind the US.
- Omdia expects the **UK** to have lower-than-proportional revenue due to sharper price competition and greater strength of the OTTs.
- Middle East and Africa (**MEA**) will have lower performance because of lower smartphone penetration and lower purchasing power.
- We exclude China from this graph and the analysis because it is a different RCS market considering the high penetration of proprietary Android forks, Google's challenges in the country, and the ongoing trade issues, which could impact Apple's deployment.

The shares of traffic and shares of revenue by region also vary somewhat, reflecting different pricing philosophies (see **Figure 2**).

Figure 2: RCS for Business: Share of traffic and share of revenue for 2029



Source: Omdia

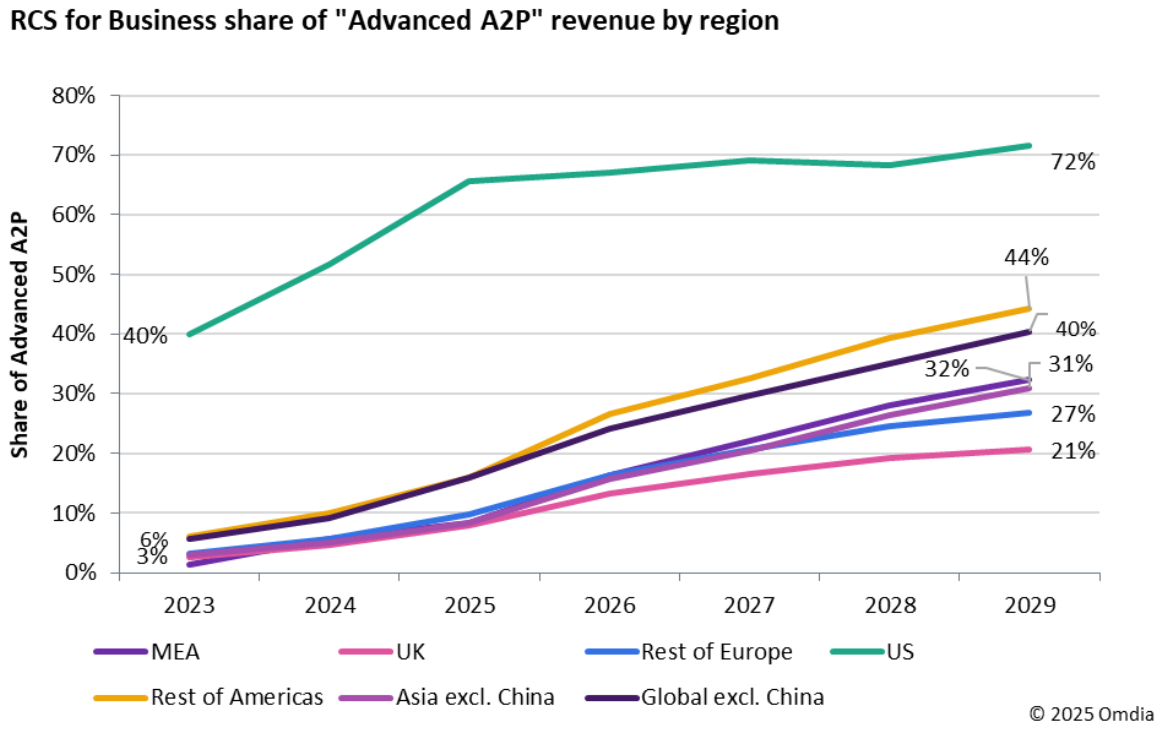
Normally, a region's global share of traffic is the same as its share of revenue, as might be expected. However, in the case of the US, traffic share is much lower than revenue share, and in the Rest of the Americas, it is the opposite. This mismatch can happen if the average price per message is lower or higher than the global average price per message. Omdia projects the US to have a below-average price per message, reflecting competitive pressures. The Rest of the Americas is in the opposite situation because of traditionally higher-than-average A2P SMS pricing and market structure in some key countries.

By the end of the decade, Omdia projects that SMS will still be the primary vehicle for A2P messaging, with 37% of the messages globally and 84% of the A2P revenue, although both of these will be lower than they are today (50% and 93%, respectively).

RCS and OTT messaging apps will dispute the rest of the market, which might be called the "Advanced A2P" segment, using richer media and greater interactivity. In this segment, RCS starts with a low share but rises rapidly, achieving 25% of messages and 42% of Advanced A2P revenue globally by the end of the decade.

However, share performance varies between regions/countries. **Figure 3** below shows the evolution of RCS share in the Advanced A2P segment by region. The US is in a special situation given its more advanced adoption of the technology today. Lower shares for RCS for Business at the end of the period reflect more entrenched positions for the OTT messaging apps. However, the US experience shows that higher share trajectories are possible. The German case study at the end of this chapter gives some ideas.

Figure 3: RCS for Business: OTT A2P revenue share in the Advanced A2P segment



Source: Omdia

Use cases

RCS for Business use cases are varied, but most fall into one of the following categories.

Direct marketing

The challenge is making the user feel safe about engaging. The business's challenge is getting enough coverage, especially targeted coverage, to bring new customers.

With enhanced two-way rich media capabilities and the ability to reach all Android and iOS 18 smart devices, RCS is a more effective tool for direct marketing campaigns than either SMS or OTT messaging apps. Branded messages and the assurance of a verified sender give mobile users the confidence to click. Quick Action buttons and the potential for interactivity build engaging experiences to attract Millennial and Gen Z consumers.

M-commerce and financial services

Shopping on mobile and banking / insurance over mobile have been applications for some time. However, some users are reluctant to use these apps or to buy goods in response to a direct marketing message for fear of fraud or phishing. Businesses, especially financial institutions, have an equivalent fear of fraud: that the individual who says they are a customer really is who they say they are and that the payment information they give is valid.

RCS's verified sender and branding build user confidence to enter delicate personal information during a transaction. Network APIs (more on these in the next chapter) assure the business or financial institution that transactions are legitimate.

Customer care

A customer care application has aspects of both the previous two categories. A brand may want to reach out to one of its registered customers to ask about a service, request payment, give them a loyalty reward, or inform them about a special offer. The mobile user may be responding to outreach from the business, like paying a bill, or the need may be self-generated, like registering a service issue or responding to marketing from other channels, such as public advertising.

From either point of view, RCS is a powerful tool for customer care because of reach, security, and identity confirmation, as well as an often overlooked barrier to usage, the need to download an app. RCS is part of the inherent capability of an Android or Apple iOS 18 device. It is always there, always on.

Analytics

Marketers and customer experience managers rely on data to fine-tune their strategies and individual campaigns. On the internet, they can count on several tools that provide them with dashboards and detailed analyses of their activities.

RCS for Business platforms offer equivalent tools to give MNOs and their enterprise clients the analytical information they need to understand their programs. Platform vendors build these capabilities into their software, providing statistics ranging from security, deep traffic monitoring, and agent performance to chatbot checking (see page 16).

These tools are fundamental to making any use case a success.

Finally, Gen AI enhances all of these use cases, and RCS's ability to make the user feel secure about their interactions will encourage both sides of the communication to feel confident

about trusting the AI. Agentic AI, where artificial intelligence can execute complex sequences of tasks like booking an airline ticket from a prompt like “I want to go to Miami on Saturday,” is ideally suited to using RCS’s richer media and conversational capabilities.

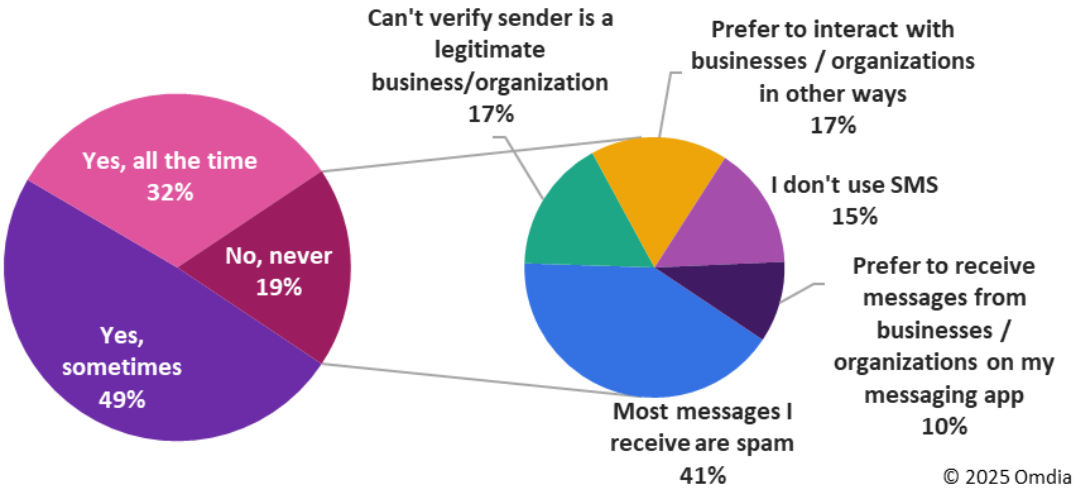
The need for secure messaging

Omdia puts a lot of emphasis on security and trust because its research highlights a confidence gap for mobile users and OTT messaging users.

Omdia asked over 20,000 consumers whether they had opened text messages from businesses or organizations on their phones, and a good percentage of these said “Yes”—nearly one-third said “All the time,” and nearly another half said “Sometimes.” Generally, consumers trust text messaging.

However, nearly one in five said, “No, never.” See **Figure 4**.

Figure 4: 58% of those who never click on an SMS say most messages are spam or that they can’t verify the sender



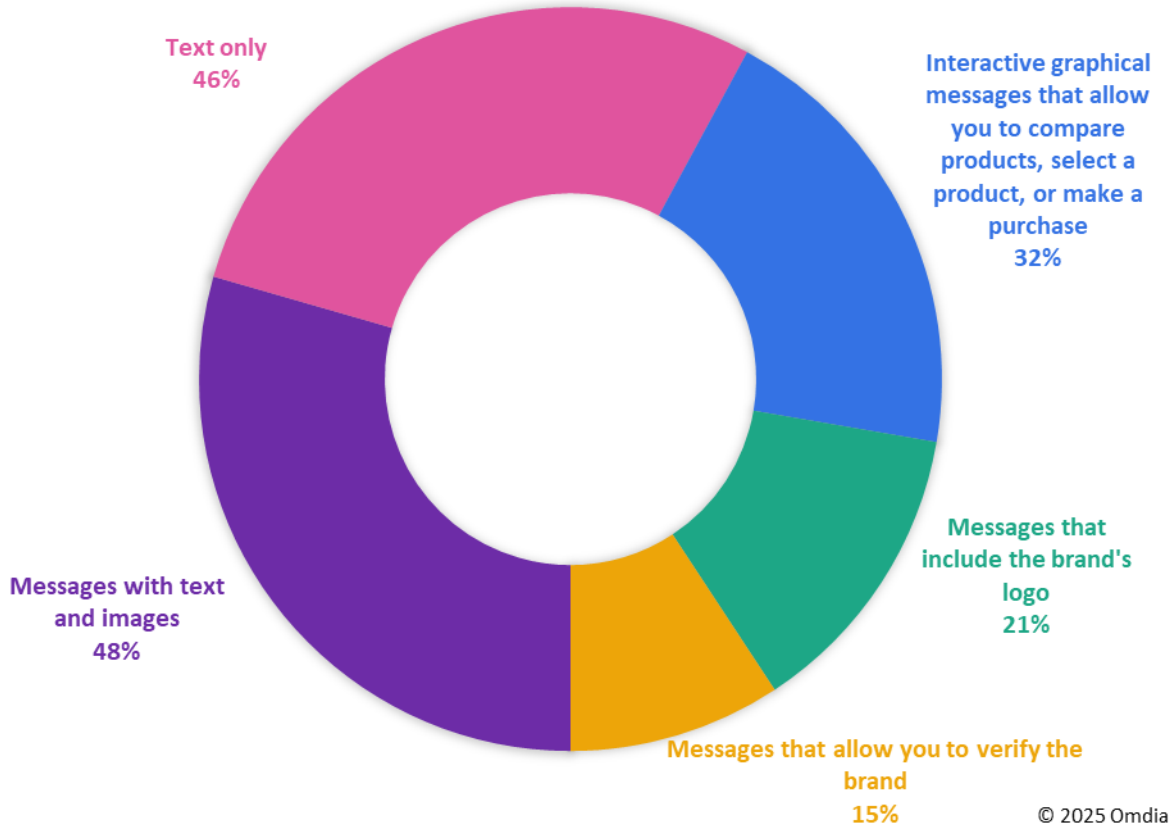
Source: Omdia

More than half of the “No, never” group (58%) mentioned reasons related to the security of the inbound message: 41% said they usually get spam, so they don’t bother opening any message, and another 17% explicitly identified the inability to verify the sender’s legitimacy.

RCS allows businesses to deal with these issues, verifying the sender, branding messages, and presenting attractive (branded) content that catches the reader’s attention.

We asked the respondents who were disposed to click on a message what they preferred to see, and **Figure 5** shows the results.

Figure 5: What format of marketing/notification messages from businesses do you most prefer?



Source: Omdia

These survey responses look like the design specification for RCS for Business.

The need for partnerships

MNOs face a skills challenge with selling RCS for Business and supporting business customers. The power of the technology comes from increasingly sophisticated applications. Many of these are virtually entire web pages or mini-apps developed within the RCS framework. Many of the more interesting use cases, like m-commerce or banking, require specialized, industry-specific knowledge.

For this, we strongly recommend that MNOs develop partnerships with leading communications platform vendors and/or communication platform as a service (CPaaS) companies for the “heavy lifting” on the technology front, and an ecosystem of local developers for the RCS business applications. Vendors have broad experience implementing the technology for different use cases and in different markets. An ecosystem of application developers allows them to specialize by vertical (finance, retail, hospitality) and/or by application type (direct marketing, m-commerce, m-banking, customer care).

The MNO often lacks the human resource “bandwidth” to cover every vertical or every type of application in the “long tail” of enterprise clients.

Use what you sell

You can kick off your RCS for Business strategies by implementing a customer care system for your users. This could certainly include implementing self-service portals for plans and options and, if feeling ambitious, an RCS-based online store for devices and other accessories.

There are three advantages to doing this:

- **Mobile users must be educated on RCS**, discovering its wealth of features beyond the SMS they might be used to.
- **Use what you sell and create working demos**—inevitably, a business customer will want to see examples from their market, not just from early adopters.
- **Leverage the rich features that RCS brings to customer experience.** Believe in the technology and learn how it improves clients' interactions with a company.

Case study: Germany's telcos collaborate for RCS for Business

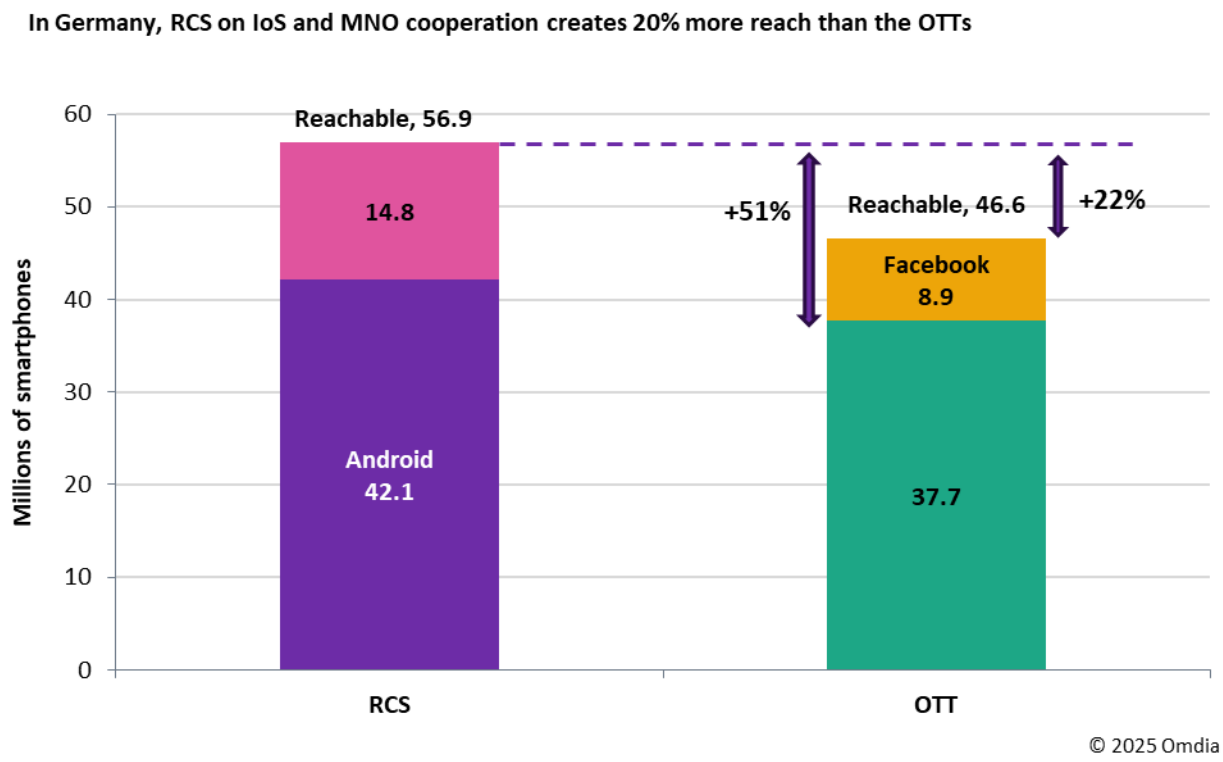
German operators worked together to promote RCS—both P2P and A2P—and increase the scope of RCS applications in that country.

On February 5, 2020, O2 (part of the Telefonica group) became the third major operator to offer RCS in Germany, guaranteeing complete coverage of (at that time) all Android smartphones. Remarkably, perhaps, competitors Deutsche Telekom (DT) and Vodafone attended the O2 launch event to demonstrate their commitment to deploying the technology. The three operators took turns presenting from a common slide deck.

Now, five years later, the collaboration continues. The three companies maintain a website, *rcsbusinessmessaging.de*, dedicated to promoting RCS for Business with whitepapers, explanatory videos, and case studies, ranging from direct marketing and m-commerce to customer engagement. A common "contact us" form routes to a centralized RCS marketing team, or there are "buttons" for sending messages directly to contacts within each of the three operators.

Today, by combining forces, the German MNOs offer business customers a superior footprint to that of messaging leader WhatsApp, as **Figure 6** illustrates.

Figure 6: Comparing RCS reach with OTT messaging app reach in Germany



Source: rcsbusinessmessaging.de, Omdia

In terms of applications, DT used RCS to market a Spotify promotion to its clients, O2 partnered with DHL to enhance mobile shipment tracking via RCS, and Vodafone used the technology to allow commuters to book public transportation tickets through Vodafone's RCS messaging and pay directly through their phone bills. The DT Spotify example demonstrates the value of MNOs using the technology to reach their own customers, while the O2 and Vodafone cases took advantage of access to all German mobile users. Neither would be as effective if restricted to just O2 or just Vodafone clients.

These examples leveraged third-party developers outside the mobile operator: Infobip for the DT/Spotify marketing campaign, Link Mobile for the O2/DHL application, and Horisen and Dimoco Payments for the Vodafone public transport ticketing platform.

By working with partners and working together, the German MNOs have accelerated the adoption of RCS for Business.

Combining Network APIs with RCS to unlock monetization for telcos

Network APIs offer network services to other pieces of software to create applications that communicate with users, databases, AIs, enterprise systems, and so on. Network APIs for RCS are primarily focused on subscriber identity, antifraud, and financial use cases, but interest is spreading to other areas, such as quality on demand (QoD), location, and payments.

“Network APIs” also include a developing community between MNOs, the major vendors (like Ericsson and Nokia), public cloud providers—i.e., hyperscalers (like AWS, Microsoft, and Google)—communication platform providers, and a broad ecosystem of developers and systems integrators that use these APIs to build enterprise applications. GSMA’s Open Gateway project promotes the use of Network APIs. A related initiative, CAMARA, under the Linux Foundation, standardizes the APIs, and Open Gateway selects those it promotes to its constituents.

Network API examples

Much of the current effort has focused on broadly defined security applications like verifying subscriber identity to support financial transactions like m-banking or m-commerce. Some of these include:

Number verification, to assure that the telephone number of the device matches the telephone number on the user’s account profile. This can be done “silently” without the intervention of a call center, saving costs and not disturbing the customer.

“Know Your Customer Match”: To validate key user profile information, which is another anti-fraud check that is also a means to “inform” an application about the user, for example, to improve targeting in direct marketing.

SIM swap: To assure that the user’s identity has not been taken over.

Device location: To assure that the user’s device is in the same geography as the banking machine or point-of-sale terminal generating the transaction—or, for geofencing, a transaction based on the customer’s or the bank’s parameters.

Also supporting RCS for Business’s mandate in online commerce is the **Carrier Billing API,** which allows users to put their purchases on their monthly carrier bill.

Beyond the fraud detection use case, device location also allows targeted offers to get to the phone in a direct marketing use case, therefore offering more personalized customer engagement.

The **Quality on Demand API** (QoD API) facilitates several bandwidth- or latency-sensitive applications like certain financial transactions, as well as drone management and “next generation” applications like artificial intelligence and self-driving vehicles.

The GSMA website has a complete list of the GSMA-selected API. The CAMARA website (see the Further reading section) has an even longer list of APIs that have been standardized but not yet selected by Open Gateway.

Marketing and monetizing

MNOs will mostly monetize Network APIs by charging the enterprise customer for their use in an app. Omdia estimates that this revenue will come to $8.7bn by 2029. Since we estimate telco messaging revenue (A2P and P2P) will be $80bn, Network API revenue could represent an additional 11% of telco messaging revenue, a small but important contribution.

Because most of these APIs deal with identity verification and anti-fraud, they support the MNOs’ most powerful argument for RCS for Business versus the OTT apps: the strength of the mobile network and the operators’ role as a trusted partner.

Network APIs can become another “conversation starter,” a means to open a dialogue with major enterprises, a dialogue which could lead to a deeper relationship around connectivity, computing, or managed services.

Using messaging-as-a-platform services to accelerate RCS for Business speed to market

Inevitably, someone in management or on the board will ask, “Do we have the resources to take on this new challenge?” The answer, in the beginning, will be “No.” While RCS messaging is inherent to the mobile network, the capability to easily onboard new enterprise agents, implement their solutions, bill them, and manage their traffic is not. Many operators who have embarked on the RCS journey have been stymied by the limited tools in the basic RCS platforms from Google or, now, Apple.

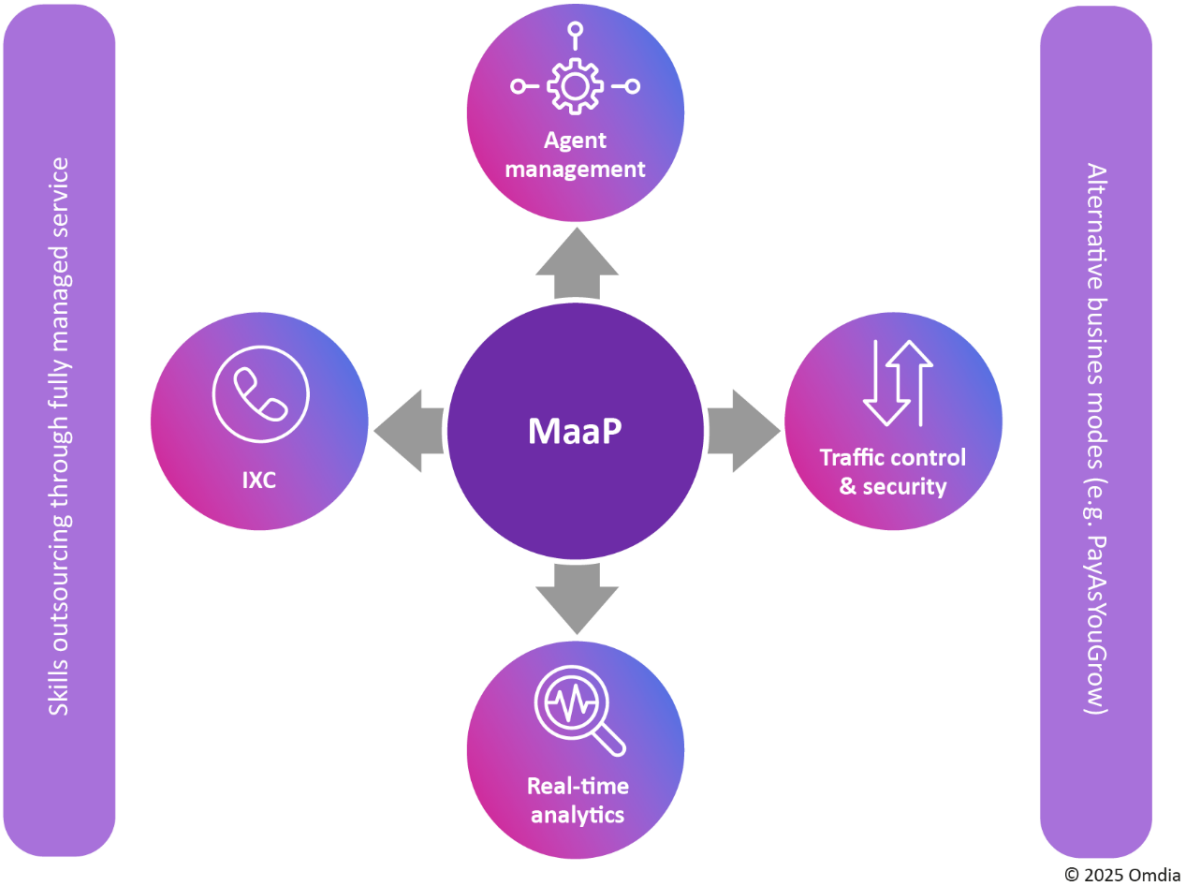
Omdia recommends partnering with one of the messaging as a platform (MaaP) providers, often a communication technology vendor. The mobile operator can concentrate on customer relationships and working with the ecosystem to develop applications, letting the MaaP simplify management of the service delivery.

Exploring the MaaP

A MaaP is an all-in-one solution for common administrative activities like managing agents, billing, and traffic control. A world-class MaaP gives you flexibility and control to manage, monetize, and grow your RCS for Business revenue.

The core elements are shown below in **Figure 7**.

Figure 7: Messaging as a platform



Source: Omdia

Agent management: For the RCS for Business enterprise agents, onboarding, offboarding, billing, and care.

Traffic control and security: Traffic management critically affects customer experience, and security is fundamental to RCS's value proposition versus OTT or SMS. However, neither is part of the core capability and must be added to the mix.

Real-time analytics: Fundamental to traffic management and threat detection is deep, real-time data.

Interconnection (IXC) with other operators: Also fundamental to the RCS proposition is the "it just works everywhere" legacy of SMS and MMS. However, that does not happen "for free." Someone or something must make national and global connectivity happen.

The MaaP integrates these tools with the underlying Google or Apple platform to make management, billing, and control easier.

MaaP vendors typically offer two additional capabilities to simplify the RCS for Business investment case:

- The option to fully outsource all the administration of RCS business customers as a **managed service**. There is no need to train existing resources or redirect them from other activities. The partner runs the service.

- The option to negotiate **creative business models** to pay for the MaaP. Pay-as-you-grow models de-risk the investment without sacrificing efficiency. Some vendors may even be open to revenue sharing or other shared risk models.

MaaP carries the load

MaaP lets you focus on the strategic parts of RCS for Business: building RCS familiarity with mobile users, relationships with enterprise clients, co-creation of applications and new use cases, cultivating a developer ecosystem, and strengthening alliances with other operators to build the RCS value proposition for all mobile users and enterprise clients.

The managed services MaaP option can accelerate mobile operator deployment of RCS for Business by freeing time and resources to focus on enterprise clients and applications.

Conclusions and recommendations

Conclusions

RCS puts the network, and so the telco, at the center of messaging once again. The technology answers the challenges of OTT messaging apps but sits at the core of the mobile network.

Users won't pay for P2P messaging given free OTT alternatives—RCS monetization means RCS for Business. Because OTT messaging is "free," MNOs cannot charge for P2P RCS. However, enterprises will pay for RCS's greater reach and MNOs' trusted position with users.

OTTs have a head start, albeit with a less feature-rich solution and low monetization. Statistically, A2P SMS revenue is already shifting rapidly to OTT messaging apps, as these dominate P2P communications. RCS is the only way to stop/slow the bleeding.

Apple deployment of RCS in iOS18 vastly improves the technology's reach, especially in developed markets. Omdia estimates that now, RCS resides on more smartphones than WhatsApp, more even than WhatsApp and Facebook Messenger combined.

RCS for Business applications from a telco offer secure operations from a trusted partner. Core capabilities like Verified Sender and Network APIs promote trust with users. This then encourages monetary transactions such as banking or online purchases.

Standards enable a vibrant ecosystem of developers and operator partners. Standards provide a stable implementation framework that frees developers to pursue creativity. A stream of new features encourages new use cases and interoperability between operators, even in different countries, broadening reach for large enterprises and MNC customers.

MaaP speeds time to market. A platform to do all the essential management tasks that underly an RCS for Business application, MaaP allows the mobile operator to concentrate on the essentials like supporting the enterprise client and developing new use cases. If the mobile operator outsources administration to a managed service, it frees up more resources.

Recommendations for telcos

Move quickly on RCS. OTTs have a head start from their dominance of P2P messaging.

Build a customer experience app in RCS for your own customers early on. Local examples and "use what you sell" are powerful arguments when talking to clients.

Target banks and other customers who will need secure communications and need their customers to be assured that communication is secure. RCS assures them of that.

Use RCS to start customer conversations with marketing teams and expand influence in the enterprise customer. Especially for integrated fixed and mobile operators, make RCS a conversation starter with clients.

Partner with other telcos to extend reach and lower development costs per message. Like the German case study, work together to encourage P2P RCS, educate enterprises, and extend reach beyond where the OTTs can go.

Build an ecosystem of trusted developers and a marketplace of plug-and-play applications. The most powerful are vertical-specific, and MNOs cannot cover all industries or even all application technologies in the longtail of enterprises.

Create generative AI and agentic AI applications to deepen customer engagement through personalization and enhanced security. The interactive capability of RCS gives a platform for AI-based applications in customer care and m-commerce.

Adopt an MaaP from a vendor with proven success stories in a broad range of markets and with a full suite of trusted, standardized APIs. MaaP accelerates RCS for Business, and choosing the right vendor is critical.

Appendix

Methodology

This white paper combined Omdia messaging forecasts and the results of the *Digital Consumer Insights Survey 2024* with previous Omdia writings on RCS and industry conversations.

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Author

Wally Swain
Principal Consultant, Telecoms
askananalyst@omdia.com

Get in touch

www.omdia.com
askananalyst@omdia.com

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