



Data, AI/analytics and development platforms: worldwide forecast 2022–2027



Adaora Okeleke

About this report

This report provides forecasts for communications service provider (CSP) spending on data, AI/analytics and development (DAD) platforms and related services for 2022–2027. It provides details on spending by delivery model, service type, region and major drivers, including 5G. The report also provides recommendations for vendors and CSPs.

The report is based on several sources, including:

- Analysys Mason’s research from the past year
- interviews with CSPs and vendors worldwide.



GEOGRAPHICAL COVERAGE

- Worldwide
- Central and Eastern Europe
- Developed Asia–Pacific
- Emerging Asia–Pacific
- Latin America
- Middle East and North Africa
- North America
- Sub-Saharan Africa
- Western Europe

SERVICE TYPES

- Standalone platforms: including data, AI/analytics and development platforms (licensed and "as-a-service"-based platforms)
- AI/analytics applications
- Embedded DAD platforms
- Mediation platforms



KEY QUESTIONS ANSWERED IN THIS REPORT

- What are the key trends and factors that will affect the data, AI/analytics and development platforms market during 2022–2027?
- What are the regional factors that will drive revenue growth?
- What should vendors do to exploit new business opportunities?
- How will professional services for data, AI/analytics and development platforms perform during the forecast period?
- What are the major drivers that will influence CSP spending on data, AI/analytics and development platforms?

WHO SHOULD READ THIS REPORT

- Vendors’ product management teams that focus on DAD platforms for CSPs and are responsible for feature functionality and geographical focus.
- Vendors’ product marketing teams responsible for revenue growth.
- CSPs that plan to modernise data environments and invest in AI platforms to gain meaningful insights that can help them to transform operating models to support 5G and new business models.
- Professional services vendors that want to understand the revenue growth opportunities in the DAD market for the next 5 years.

Changes to forecast for this segment: we have made two main updates to the segmentation of the DAD platforms and services market and forecast coverage

We have revised our approach to studying the DAD market since publishing our September 2021 forecast report. As a result, we have made two updates to the way that we segment our DAD forecasts.

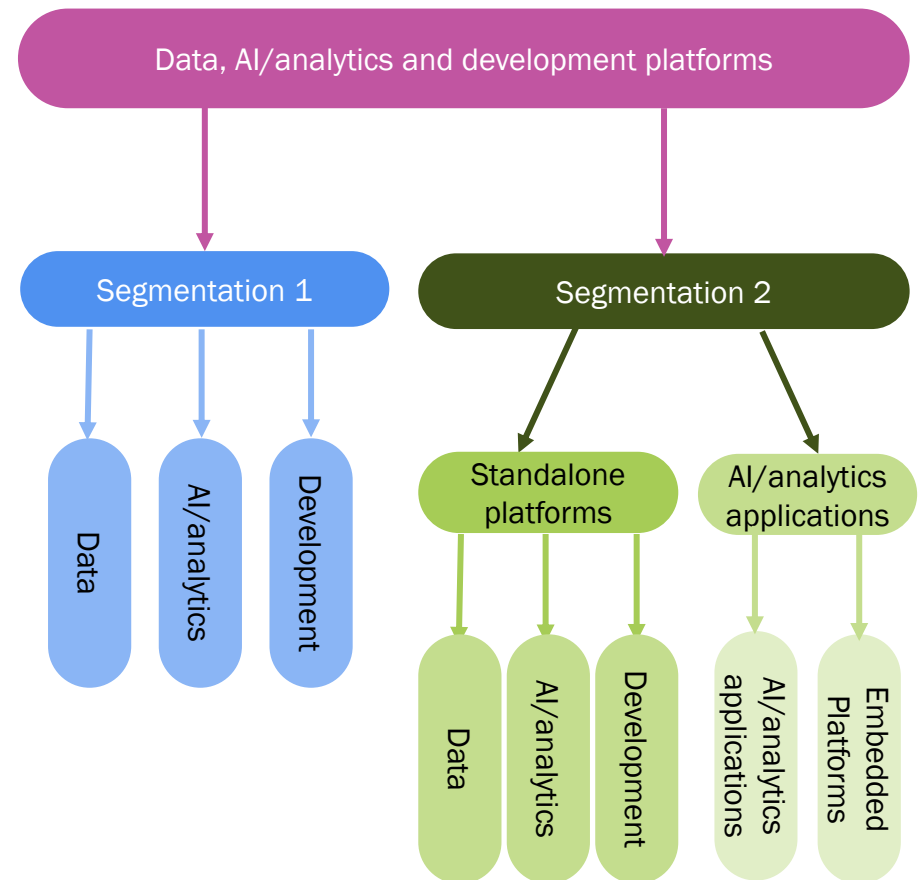
First, we have included a second level of segmentation of the DAD market: standalone platforms and AI/analytics applications. The standalone platforms sub-segment excludes mediation platforms because these focus on single use cases with embedded data platforms. The AI/analytics applications sub-segment includes point applications targeted at single use cases and broader single-vendor AI/analytics applications addressing multiple use cases. These suites are sold with embedded platforms

Second, we divide the standalone platform sub-segment into three further segments: data, AI/analytics and development standalone platforms. Standalone platforms support third-party applications. We provide forecasts on revenue growth expectations for the licensed and “as-a-service”-based offerings for these platforms.

These changes align with our research, which shows that CSPs’ adoption of platform services is increasing, as is the impact of this trend on the telecoms application market. This model helps us to study the shift in revenue between standalone platform providers and AI/analytics application providers. As CSPs’ use of platform services accelerates,¹ we expect the market for standalone DAD platform services and SaaS-based analytics applications to grow.

¹ For more information, see Analysys Mason’s [Platform services: how they can help CSPs to operate in complex environments](#).

Figure 1: Analysys Mason’s updated definition for the data, AI and development platforms segment



Source: Analysys Mason



Executive summary and recommendations

Forecast

Overall telecoms market context

Market definition

About the author and Analysys Mason

About the author



Adaora Okeleke (Principal Analyst) leads Analysys Mason's Data, AI and Development Platforms research programme. Her research focuses on service providers' adoption and use of data management, artificial intelligence, analytics and development tools to support the digital transformation of network, customer and other business operations. Adaora tracks vendor strategies for the telecoms industry to understand how they are evolving their product portfolios to include data, AI and development capabilities. She also provides key industry insights to operators and vendors on strategies for adopting these technologies. Adaora holds a BEng in Electronic Engineering from University of Nigeria, Nsukka (UNN Nigeria) and an MSc in Communications and Signal Processing from Imperial College London.

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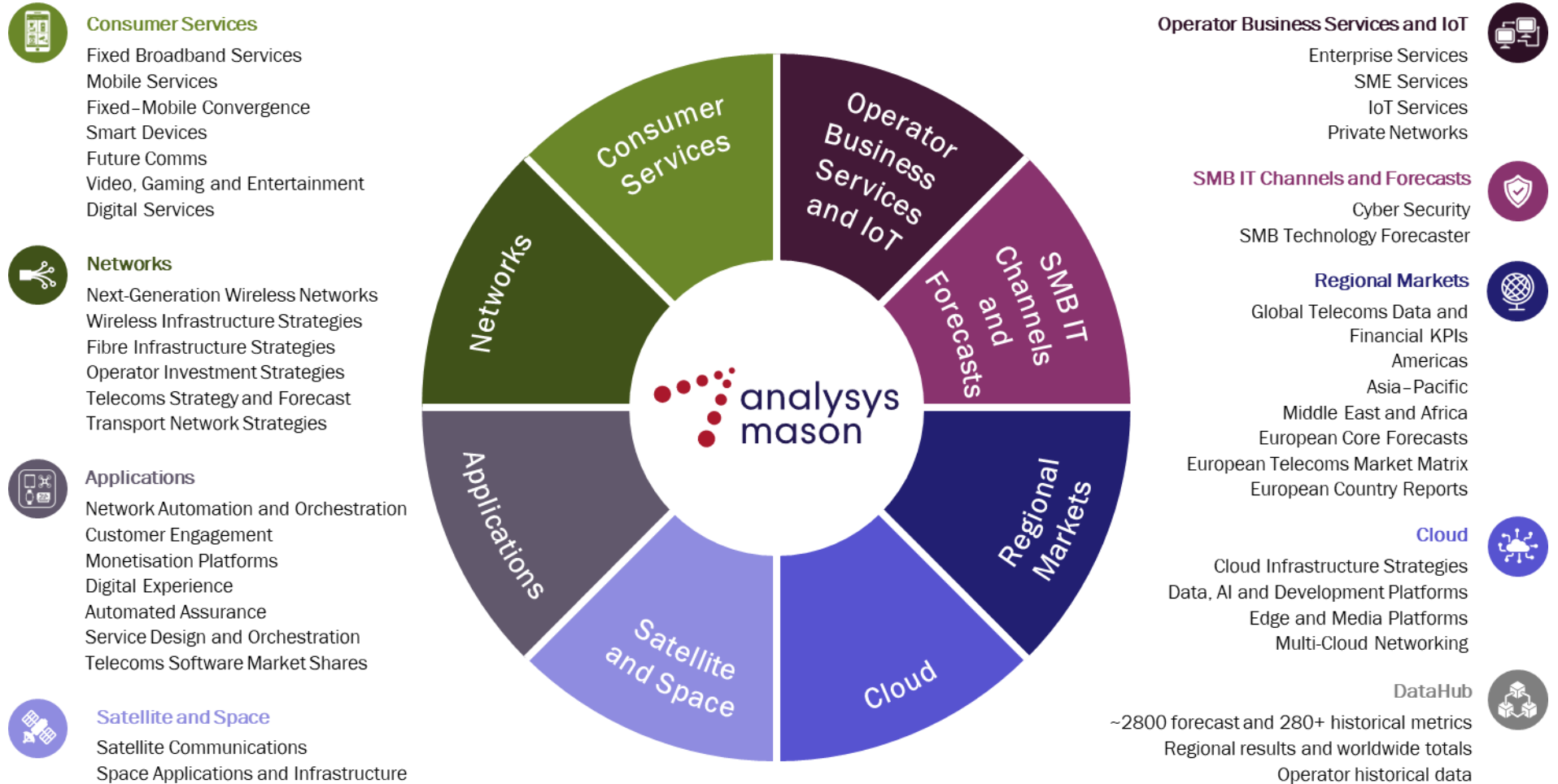
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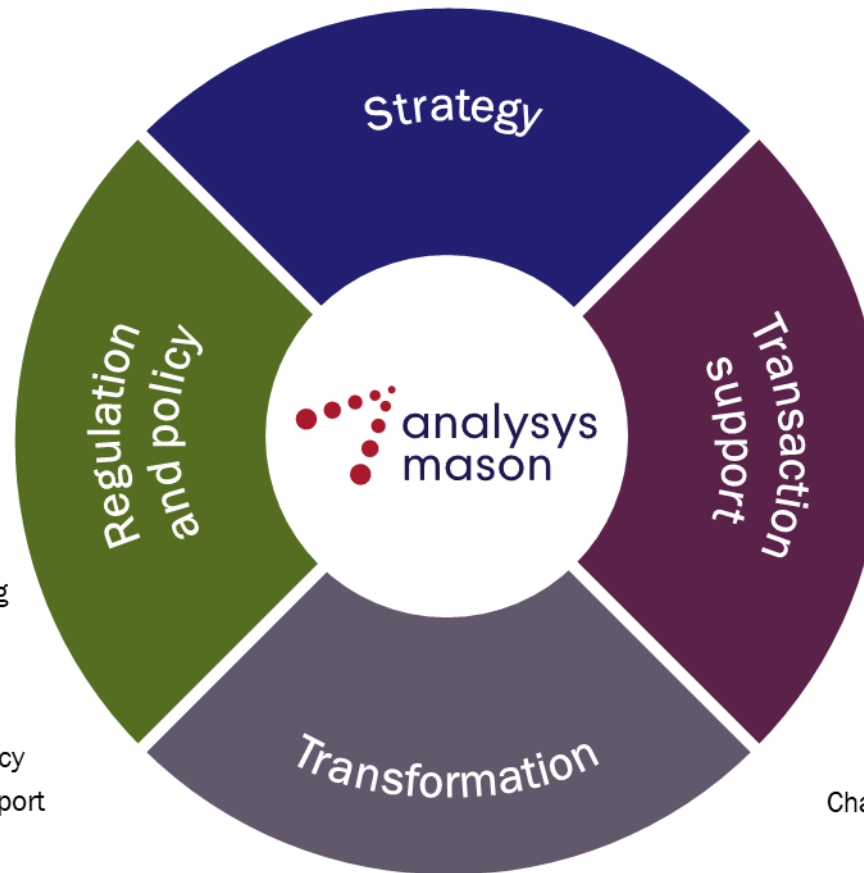
Strategy

- Corporate growth strategy
- Business unit strategy
- Infrastructure strategy



Regulation and policy

- Network and platform
- Public sector broadband intervention
- Accelerating digital transformation of society
- Price controls and cost modelling
- Regulatory accounting
- Regulatory benchmarking and analysis
- Spectrum management and policy
- Expert witness and litigation support
- Postal regulation and policy



Transaction support



- Commercial due diligence and market review
- Technical due diligence
- Post-merger integration
- Periodical business monitoring and loan technical advisory
- Opportunity scouting and pre-deal support



Transformation

- Business transformation
- Digitalisation
- Operational excellence
- Data, BI, steering and insights
- Change and programme management
- Sustainability

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