

Monetisation platforms: worldwide forecast 2021- 2026



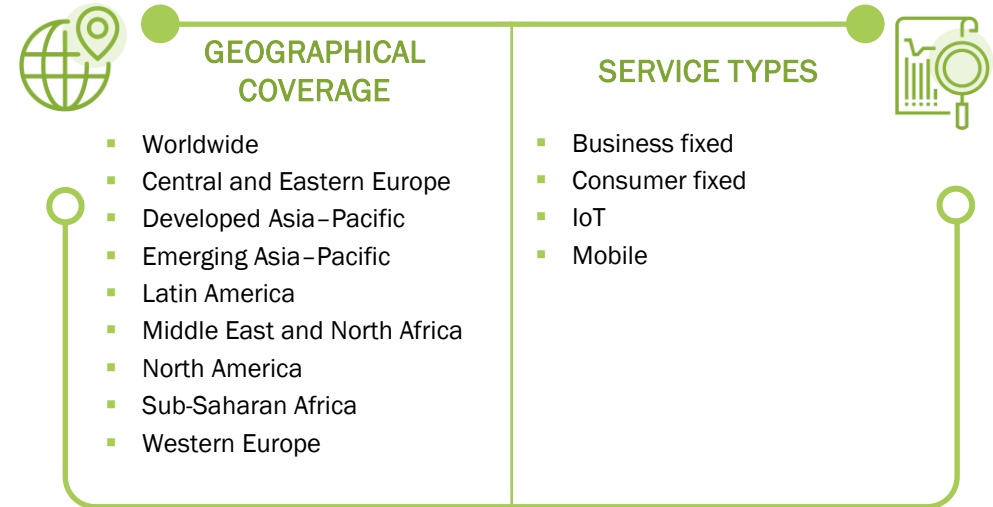
John Abraham

About this report

This report provides forecasts for communications service provider (CSP) spending on telecoms-specific monetisation platforms software systems and related services for 2021–2026. It provides details on spending by delivery model, service type and region, as well as the 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.



KEY QUESTIONS ANSWERED IN THIS REPORT

- What are the key trends and factors that will affect the monetisation platforms market during 2021–2026?
- What are the regional factors that will drive growth?
- What should vendors do to exploit new business opportunities?
- How will professional services for monetisation platforms perform during the forecast period?
- What are the major drivers that will influence CSP spending on monetisation platforms?

WHO SHOULD READ THIS REPORT

- Vendor strategy teams that need to understand how spending is shifting as CSPs seek to reduce spending on legacy systems and invest in adopting modern architecture frameworks.
- Product management teams responsible for feature functionality and geographical focus, and product marketing teams responsible for growth.
- CSPs that are planning to revamp their monetisation platforms and advance their digital transformation journeys.
- Professional services vendors that want to understand the growth opportunities over the next 5 years.

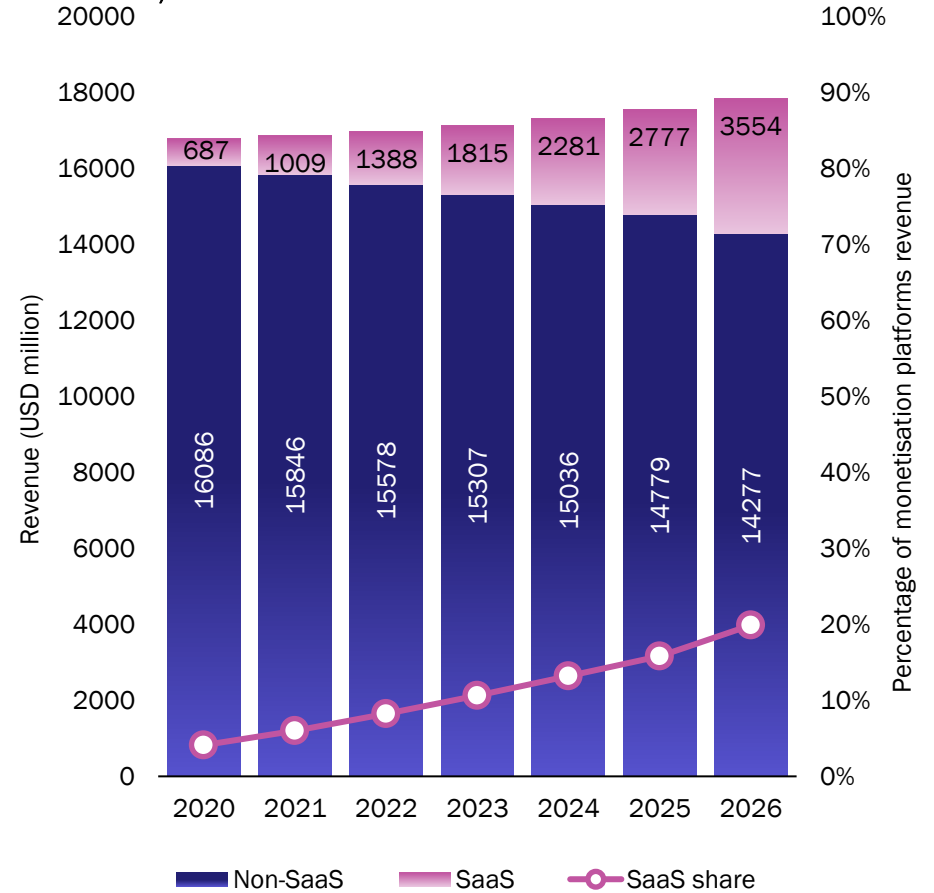
The adoption of SaaS will accelerate and the model will no longer be restricted to niche use cases

SaaS has remained a niche segment within monetisation platforms for some time now, mainly due to concerns with performance and governance. However, as public cloud becomes mainstream, even for network functions, the SaaS model will become a viable option for monetisation functions.

The popularity of SaaS-based deployment models in other industries and the widespread adoption of SaaS solutions in customer engagement have been important factors in changing CSPs’ attitude to SaaS solutions. The initial wave of SaaS deployments within the monetisation platforms sector will be driven by smaller and newer vendors; the larger providers are likely to follow some time later. SaaS adoption will not be limited to niche monetisation use cases because CSPs’ confidence in this model will increase as public cloud becomes more commonplace across telecoms operations.

Uncertainty regarding new use cases and capital constraints have made SaaS a desirable option for CSPs because it is ideal for a ‘start small and pay-as-you-grow’ approach. SaaS offers limited customisation options, but CSPs increasingly favour a configuration-centred approach to reduce the cost of operations and maintenance. Even CSP finance teams, who have previously been reluctant to accept SaaS because of its impact on overall telecoms opex, are being influenced by the lower TCO and much improved agility.

Figure 5: SaaS-related revenue in monetisation platforms, worldwide, 2020–2026



Source: Analysys Mason



Executive summary and recommendations

Forecast

Overall telecoms market context

Market definition

About the author and Analysys Mason

About the author



John Abraham (Principal Analyst) leads our digital transformation research, including three research programmes: *Customer Engagement*, *Monetisation Platforms* and *Digital Experience*. His areas of focus include customer journeys and experience, the impact of 5G on BSS systems, telecoms enterprise opportunities, cost transformation, ecosystems and value chains, and micro-services-based architecture models. John has over a decade of experience in the telecoms industry. At Analysys Mason, he has worked on a range of telecoms projects for operators in Africa, Europe, India and the Middle East. Before joining Analysys Mason, he worked for Subex, a BSS vendor, and before that for Dell in India. John holds a bachelor's degree in computer science from Anna University (India) and an MBA from Bradford University School of Management (UK).

We are experts in the telecoms, media and technology sector



Strategy

- Corporate growth strategy
- Business unit strategy
- Infrastructure strategy



Transformation

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



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



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





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- Consumer Services
- Operator Business Services and IoT Applications
- SMB IT Channels and Forecasts
- Cloud Networks

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 - Digital Services
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 - Fibre Infrastructure Strategies
 - Operator Investment Strategies
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 - Customer Engagement
 - Monetisation Platforms
 - Digital Experience
 - Automated Assurance
 - Service Design and Orchestration
- 
Cloud programmes
 - Cloud Infrastructure Strategies
 - Data, AI and Development Platforms
 - Edge and Media Platforms



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Operator Business Services and IoT programmes
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 - SME Strategies
 - IoT and M2M Services
 - Private Networks
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 - European Telecoms Market Matrix
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DataHub
 - ~2800 forecast and 280+ historical metrics
 - Regional results and worldwide totals
 - Operator historical data

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Our areas of expertise



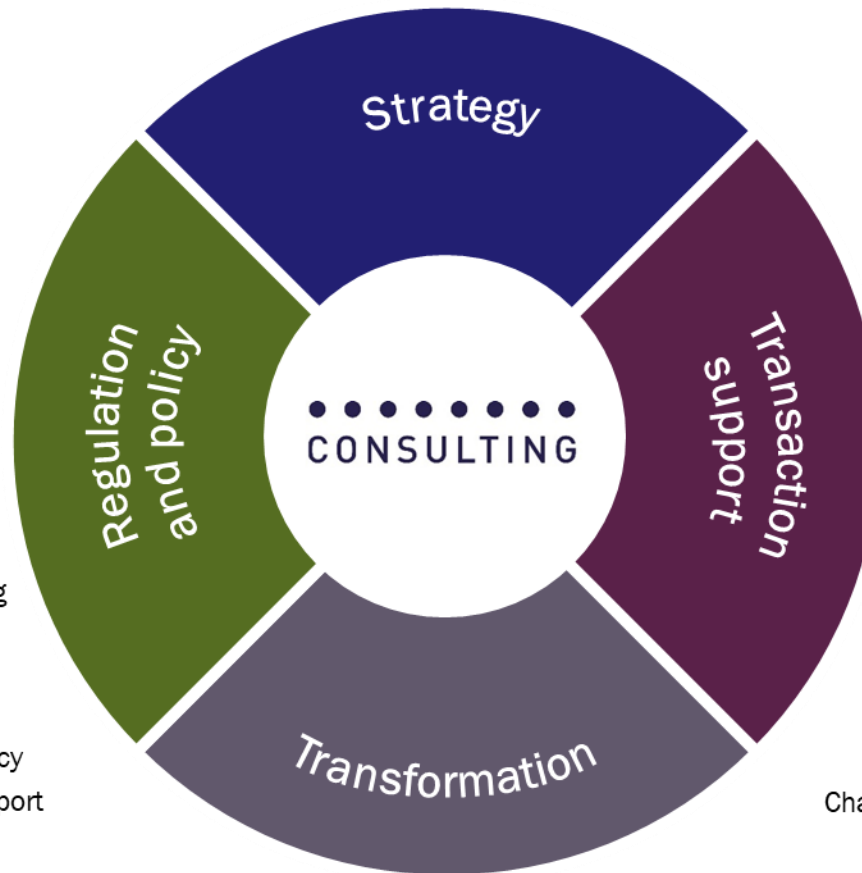
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PUBLISHED BY ANALYSYS MASON LIMITED IN **SEPTEMBER 2021**

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