

About this report

This report discusses the impact of digital technologies on the transformation of the network and the telecoms value chain. It explains why operators need to transform the software components of the network into a programmable platform that opens network capabilities to a range of internal and external stakeholders for consumption by existing and future services.

The report argues that this programmable network platform (PNP) needs to be cloud-native for optimal cost-efficiency and to future-proof its evolution.

The report provides recommendations for senior executives of any operator that wish to participate in the digital economy of the future.

It is based on several sources including:

- Analysys Mason's internal research into operator investment strategies and longitudinal research into operator cloudnative network transformation initiatives
- interviews with operators and vendors engaged with the development of programmable network platforms



KEY QUESTIONS ANSWERED IN THIS REPORT

- What is operational technology (OT) transformation and what is the impact of introducing key IT transformation to the network?
- Why is the network separating into physical infrastructure and a programmable network platform (PNP)?
- What are the benefits of a cloud-native PNP?
- Which network domains are moving fastest to becoming cloud-native?
- What are the critical success factors for implementing a programmable network platform?



WHO SHOULD READ THIS REPORT

- C-level operator executives who wish to understand the need to prioritise investment in cloud-native networks.
- Vendors interested in the market dynamics that cloud-native approaches to the network are creating.
- Operators and vendors looking for ways of articulating the drivers for the network as an open, programmable and cloud-native platform.







Executive summary

Research overview

The vision for a programmable network platform

Why does the PNP need to be cloud-native?

Milestones on the road to the cloud-native PNP

Appendix

About the authors and Analysys Mason



Our research services



Consumer Services

Fixed Broadband Services
Mobile Services
Fixed-Mobile Convergence
Smart Devices

Future Comms

Video, Gaming and Entertainment



Networks

Next-Generation Wireless Networks Wireless Infrastructure Strategies Fibre Infrastructure Strategies Operator Investment Strategies Telecoms Strategy and Forecast Transport Network Strategies



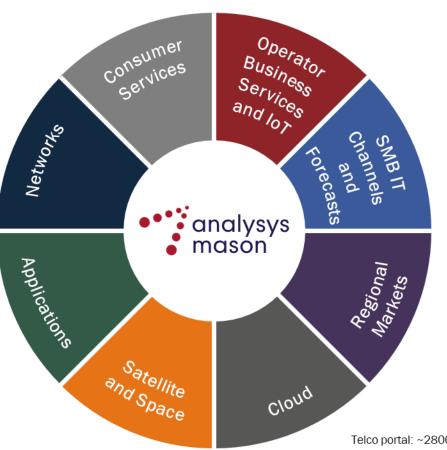
Applications

Network Automation and Orchestration
Customer Engagement
Monetisation Platforms
Digital Experience
Automated Assurance
Service Design and Orchestration
Telecoms Software Market Shares



Satellite and Space

Satellite Strategies for Telcos Satellite Capacity Satellite Infrastructure Satellite Mobility







Enterprise Services SME Services IoT Services Private Networks Cyber Security







Regional Markets



Global Telecoms Data and Financial KPIs Americas Asia-Pacific Middle East and Africa European Core Forecasts European Telecoms Market Matrix

European Country Reports

Cloud



Cloud Infrastructure Strategies
Data, AI and Development Platforms
Edge and Media Platforms
Multi-Cloud Networking

DataHub



Forecast data for 80 countries
Telco portal: ~2800 forecast and ~320 historical metrics
SMB Technology Forecaster portal: ~120 000 forecast metrics

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