



Data, AI and development platforms: worldwide forecast 2021-2026



Justin van der Lande

About this report

This report provides forecasts for communications service provider (CSP) spending on data, AI and development platforms and related services for 2021–2026. 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.

KEY QUESTIONS ANSWERED IN THIS REPORT

- What are the key trends and factors that will affect the data, AI and development 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 perform in this segment during the forecast period?



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

- Business fixed
- Consumer fixed
- IoT
- Mobile



WHO SHOULD READ THIS REPORT

- Product management teams responsible for feature functionality and geographical focus, and product marketing teams responsible for growth within vendors.

Revenue in the segment is growing overall but growth rates vary according to the sub-segment and mediation platforms revenue will decline

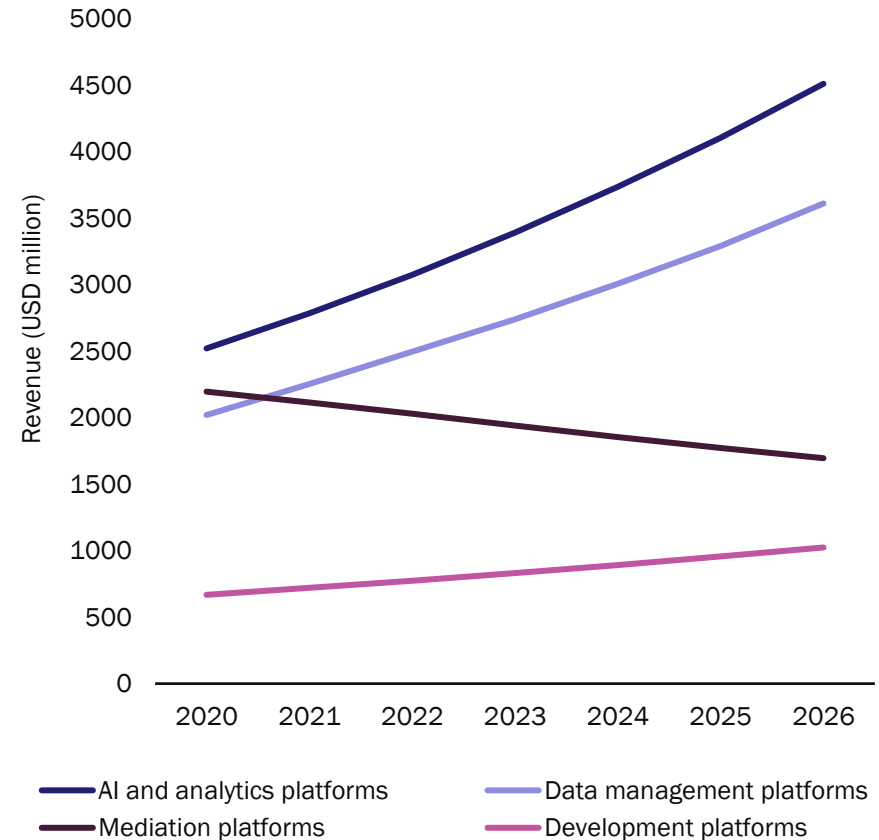
AI and analytics platforms revenue will grow at a CAGR of 10.2 % during the forecast period, driven by increased demand for data-driven automations to support improved customer services and operational processes, and more efficient use of resources.

Data management platforms revenue growth will be driven by large data volumes being consolidated from operational systems, infrastructure, devices and customers. New use cases that use intelligence built on data sets as well as the monetisation of data will continue the need to capture, manipulate and manage data. Revenue in this sub-segment will increase at a CAGR of 10.2%.

Development platforms revenue will grow at a CAGR of 7.4% driven by the shift to cloud and the adoption of CI/CD tools for support of development processes with a fast release cadence. Cloud-based applications are being re-factored into cloud-native applications based on development platforms.

The mediation systems market will decline at a CAGR of 4.1%, although not all mediation vendors will lose revenue. 5G will provide a catalyst for CSPs to retire older expensive systems and install new ones, or change and rationalise installed systems, to support new 5G mediation standards and services.

Figure 6: Data, AI and development platforms revenue, by sub-segment, worldwide, 2020–2026



Source: Analysys Mason



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About the author and Analysys Mason

About the author



Justin van der Lande (Research Director) leads the Applications practice, which is part of Analysys Mason's Telecoms Software and Networks research stream. He specialises in business intelligence and analytics tools, which are used in all telecoms business processes and systems. In addition, Justin provides technical expertise for Analysys Mason in consultancy and bespoke large-scale custom research projects. He has more than 20 years' experience in the communications industry in software development, marketing and research. He has held senior positions at NCR/AT&T, Micromuse (IBM), Granite Systems (Telcordia) and at the TM Forum. Justin holds a BSc in Management Science and Computer Studies from the University of Wales.

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



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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

Subscription research



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

Our research programmes

- 
Consumer Services programmes
 - Fixed Broadband Services
 - Mobile Services
 - Fixed–Mobile Convergence
 - Smart Devices
 - Future Comms
 - Video, Gaming and Entertainment
 - Digital Services
- 
Networks programmes
 - Next-Generation Wireless Networks
 - Wireless Infrastructure Strategies
 - Fibre Infrastructure Strategies
 - Operator Investment Strategies
- 
Applications programmes
 - Network Automation and Orchestration
 - 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
 - Large Enterprise Strategies
 - SME Strategies
 - IoT and M2M Services
 - Private Networks
- 
SMB IT Channels and Forecasts programmes
 - Cyber Security
- 
Regional Markets programmes
 - Global Telecoms Data
 - Americas
 - Asia–Pacific
 - Middle East and Africa
 - European Core Forecasts
 - European Telecoms Market Matrix
 - European Country Reports
- 
DataHub
 - ~2800 forecast and 280+ historical metrics
 - Regional results and worldwide totals
 - Operator historical data

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Our areas of expertise



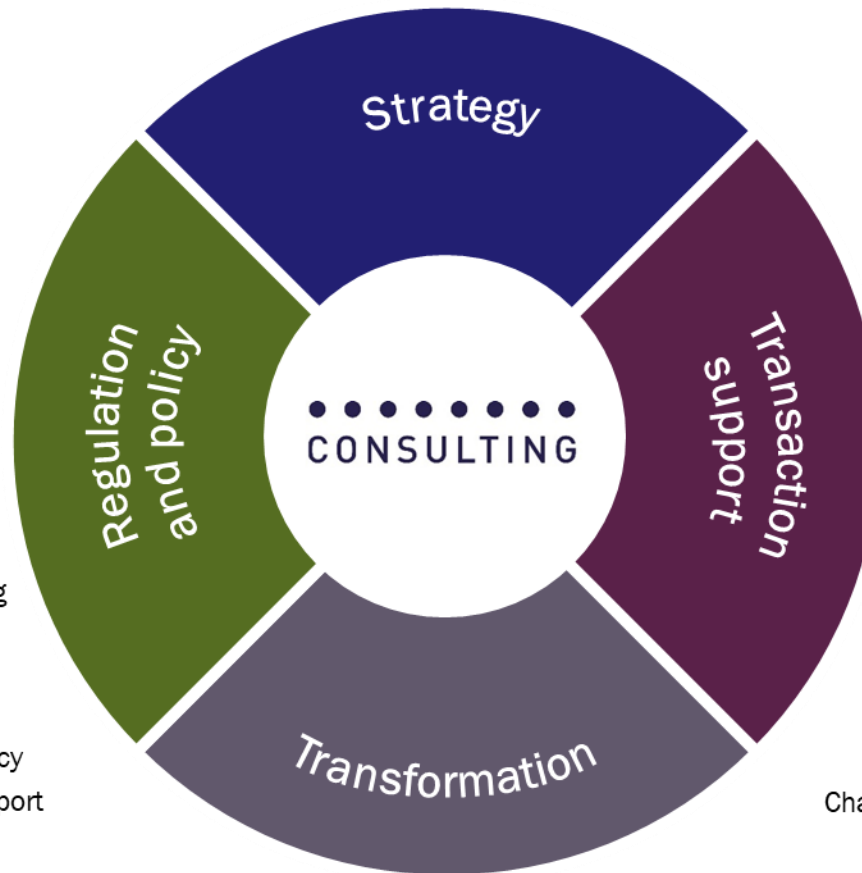
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