

RESEARCH MARKET SHARES REPORT

ANALYTICS SOFTWARE SYSTEMS: **WORLDWIDE MARKET SHARES 2016**

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About this report

This report provides market share data for communications service provider (CSP) spending on telecoms-specific analytics software systems and related services for 2016. It provides details of how the spending varied by delivery model, service type, vendor and region. The report also includes 'snapshots' of information about the leading vendors in the market.

It is based on several sources, including:

- interviews with CSPs and vendors worldwide
- Analysys Mason's research conducted during the past year.

KEY QUESTIONS ANSWERED IN THIS REPORT

- What was the overall size of the market for telecoms-specific analytics software systems and what drove this spending among CSPs?
- How did the spending vary across different sub-segments of the analytics market?
- Who are the major vendors and what is their share of revenue in the analytics systems market?
- What are the different drivers and growth rates of CSPs' spending on products, product-related services and professional services?

GEOGRAPHICAL COVERAGE

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

SUB-SEGMENT COVERAGE

- Business analytics
- Revenue and fraud management
- Network analytics

WHO SHOULD READ THIS REPORT

- Vendor strategy teams that need to understand where growth is slowing and where it is increasing across different sub-segment categories.
- Product management teams responsible for feature functionality and geographical focus, and product marketing teams responsible for market-share growth.
- Market intelligence teams at vendors that want to understand how their competitors compare to each other.
- CSPs that are planning digital transformation journeys and want to ensure that their current vendors are staying up to date.

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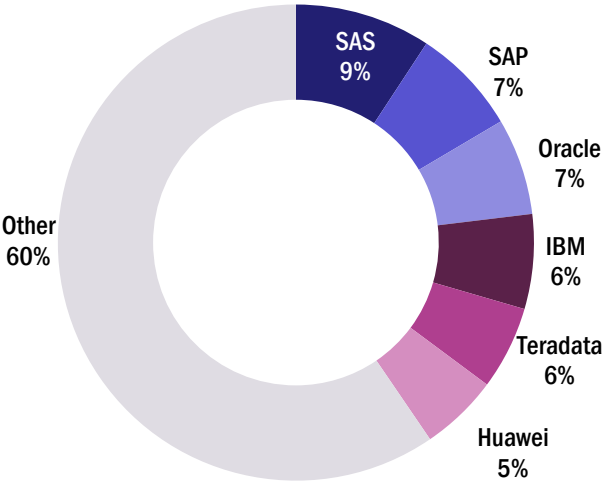
ABOUT THE AUTHOR AND ANALYSYS MASON

Dashboard: Analytics product-related revenue market shares

KEY MARKET DEVELOPMENTS IN 2016

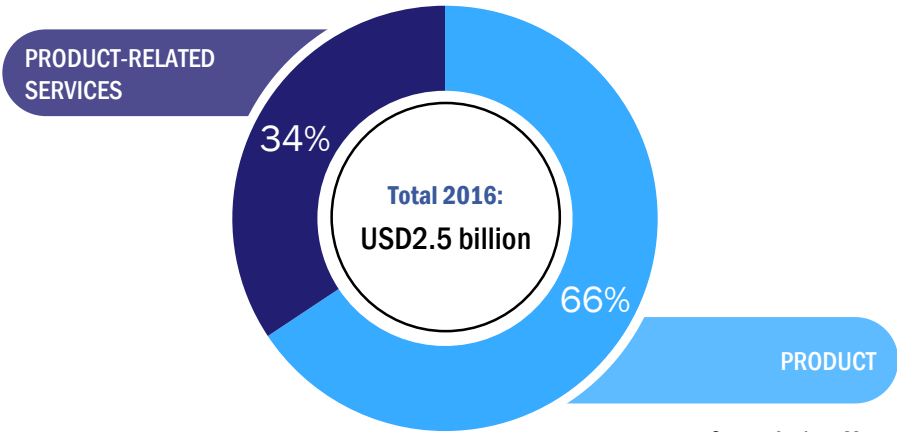
- The continued rise of interest in artificial intelligence (AI) and ‘cognitive’ computing has created growth for analytics vendors.
- The increasing use of open-source software and a steady move to software-as-a-service- (SaaS-) based delivery models has slowed revenue growth and has seen an increase in services revenue.
- Weaker-than-expected revenue has led to acquisitions of smaller, more-niche vendors within the market. This is expected to continue.

Figure 1: Analytics product-related revenue by vendor, worldwide, 2016



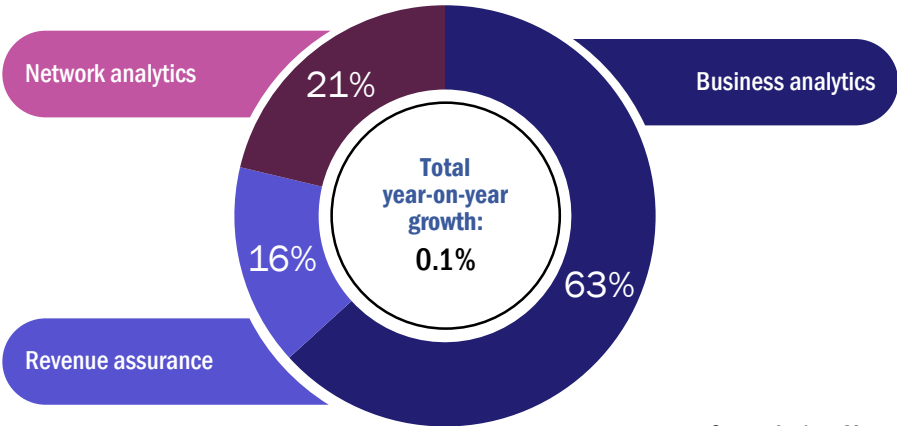
Source: Analysys Mason

Figure 2: Analytics product-related revenue by type, worldwide, 2016



Source: Analysys Mason

Figure 3: Analytics product-related revenue by sub-segment, worldwide, 2016



Source: Analysys Mason

Dashboard: Analytics professional services revenue market shares

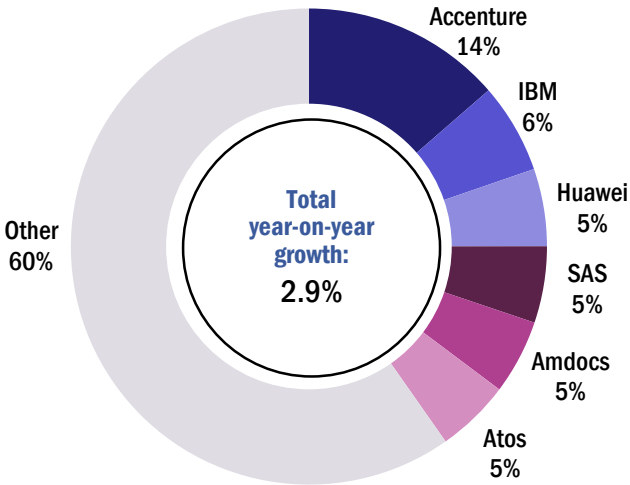
KEY MARKET DEVELOPMENTS IN 2016

- The range of professional services provide a sustainable revenue stream for analytics companies. Vendors have created different service offerings that advise, support and manage customer installations. This includes growth in cloud-based delivery.
- Telecoms-specific platforms have been launched by vendors that include Amdocs, Ericsson and Nokia – providing a framework through which services can be delivered.

DELIVERY MODEL DEVELOPMENTS IN 2016

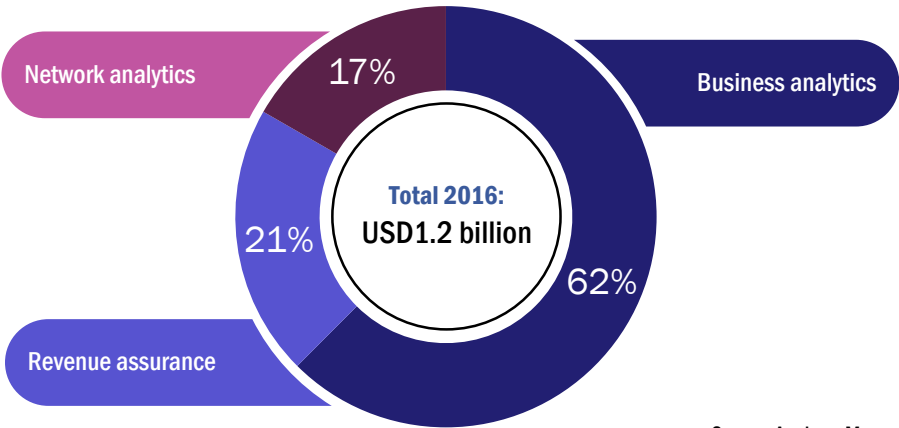
- Hosted services have continued to grow in the analytics market, with systems integrators (Sis) able to apply their platforms to the telecoms sector. Accenture, Atos, Deloitte and Infosys are all able to support analytics-based services online.
- Telefonica’s ‘fourth platform’, AURA, is now providing analytics capabilities as a service offering in the market.

Figure 4: Analytics professional services revenue by vendor, worldwide, 2016



Source: Analysys Mason

Figure 5: Analytics professional services revenue by sub-segment, worldwide, 2016



Source: Analysys Mason

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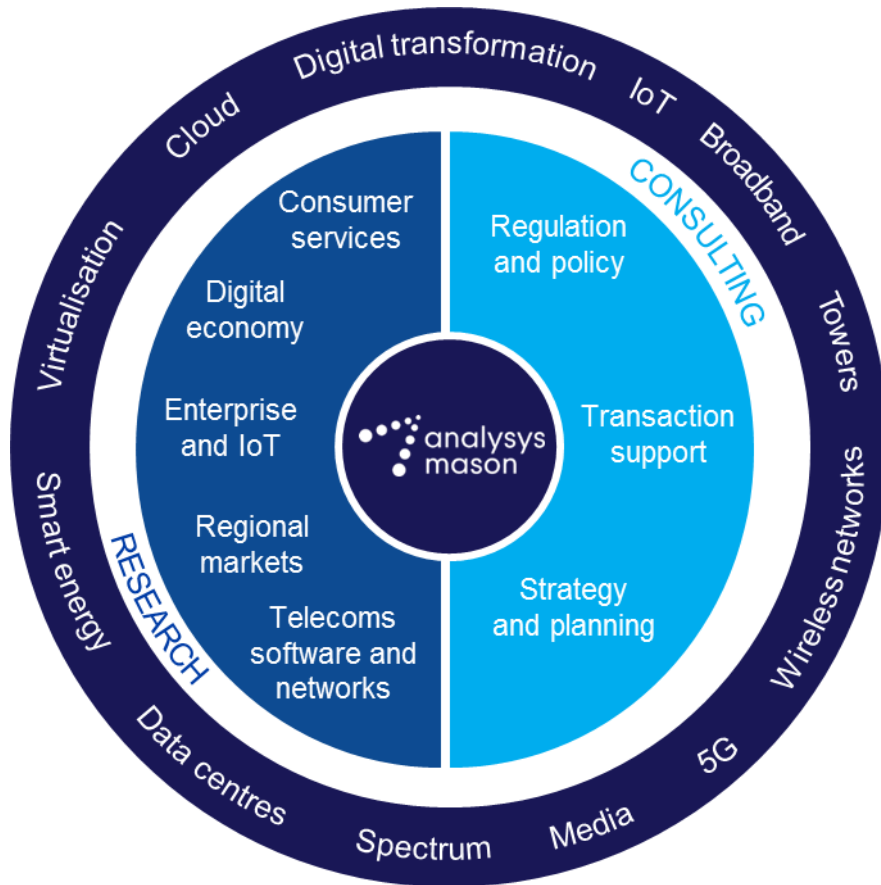
About the author



Justin van der Lande (Principal Analyst) leads the **Analytics** research programme, 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.

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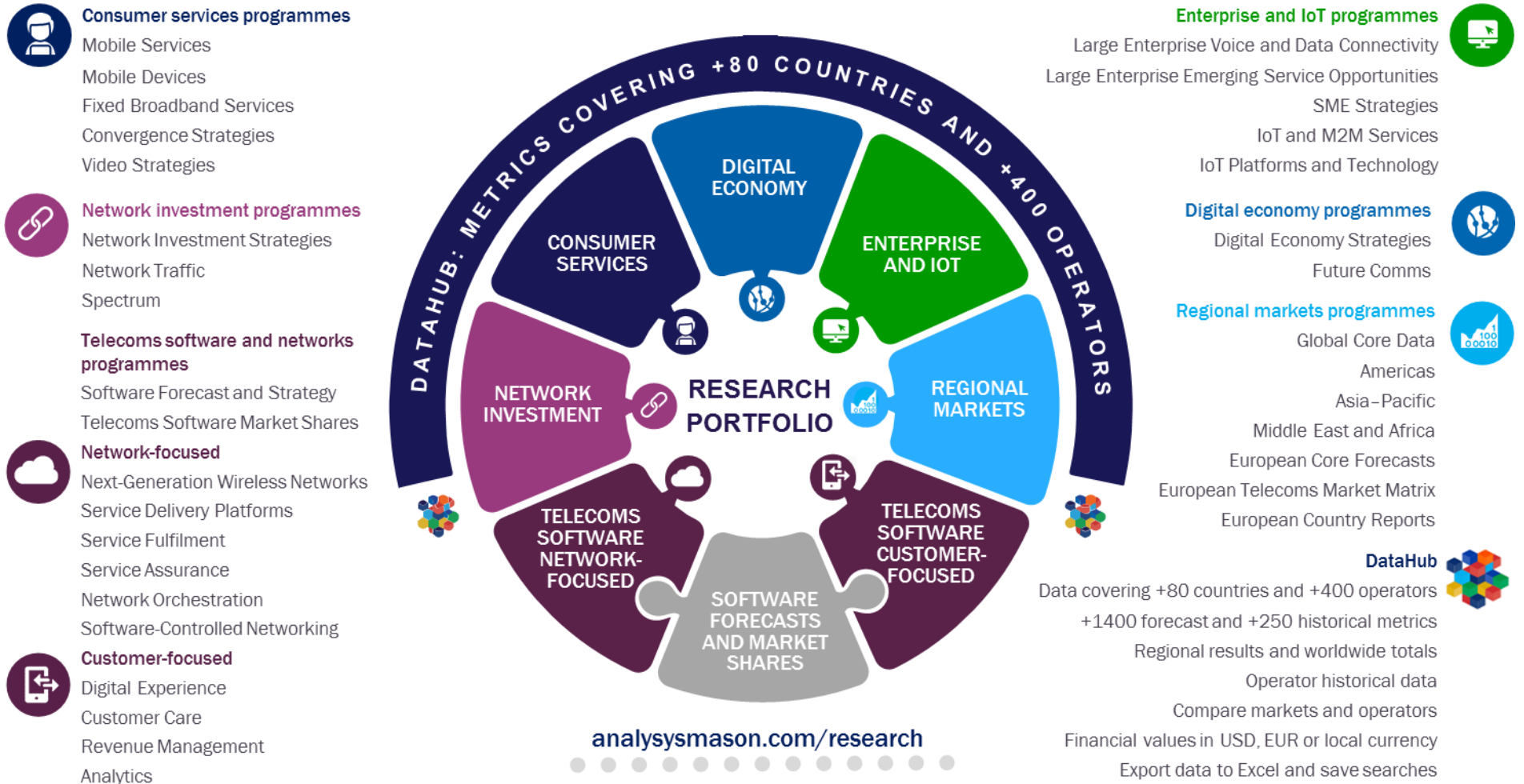
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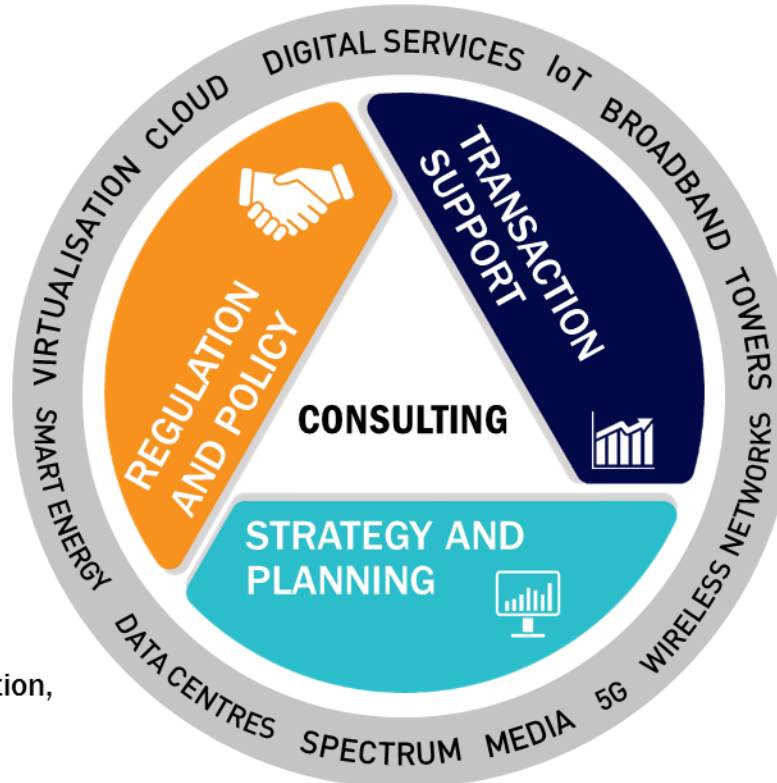
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- Net cost of universal service
- Radio spectrum auction support
- Postal sector policy: USO, liberalisation, costing, pricing and regulation



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- Data centres

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PUBLISHED BY ANALYSYS MASON LIMITED IN JUNE 2017

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