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Programmable network platform: communications service providers' progress and market forecast 2023–2030

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About this report

This report explains Analysys Mason's vision for programmable network platforms (PNPs). We explore the progress that communications service providers (CSPs) are making towards this vision by examining our forecasts for spending on the components of programmable connectivity.

The adoption of PNPs will allow CSPs to accommodate new revenue-generating services by creating connectivity fabrics that can be adjusted programmatically to support the specific connectivity requirements of different use cases. CSPs are currently making investments that will be essential for the implementation of PNPs, including investments in programmable cloud-native network clouds and on the data-driven operations of programmable networks.

We estimate that in 2022, USD10.1 billion was spent by CSPs to build programmable networks that will form the foundation of PNPs. This spending will grow at a CAGR of 16%, reaching USD32.6 billion in 2030.

This report uses data from the following Analysys Mason forecasts:

- *Network cloud infrastructure: worldwide forecast 2022–2027*
- *Data, AI/analytics and development platforms: worldwide forecast 2022–2027*
- *Public edge: worldwide forecast 2022–2027*.

KEY QUESTIONS ANSWERED IN THIS REPORT

- What are PNPs and what is driving investment in them?
- What roles do cloud-native network clouds and edge computing have in enabling PNPs?
- How must CSPs evolve their approaches to data management and AI/analytics to enable PNPs?
- What progress are CSPs making towards implementing PNPs?
- How much are CSPs spending on implementing PNPs?

WHO SHOULD READ THIS REPORT

- Strategy teams at CSPs looking to implement PNPs or to understand how introducing programmable connectivity can unlock new revenue streams.
- Strategy teams at vendors and systems integrators (SIs) that need to understand the growth opportunities in the markets for components of PNPs.
- Network API producers that need to understand how CSPs might implement API-driven network fabrics.

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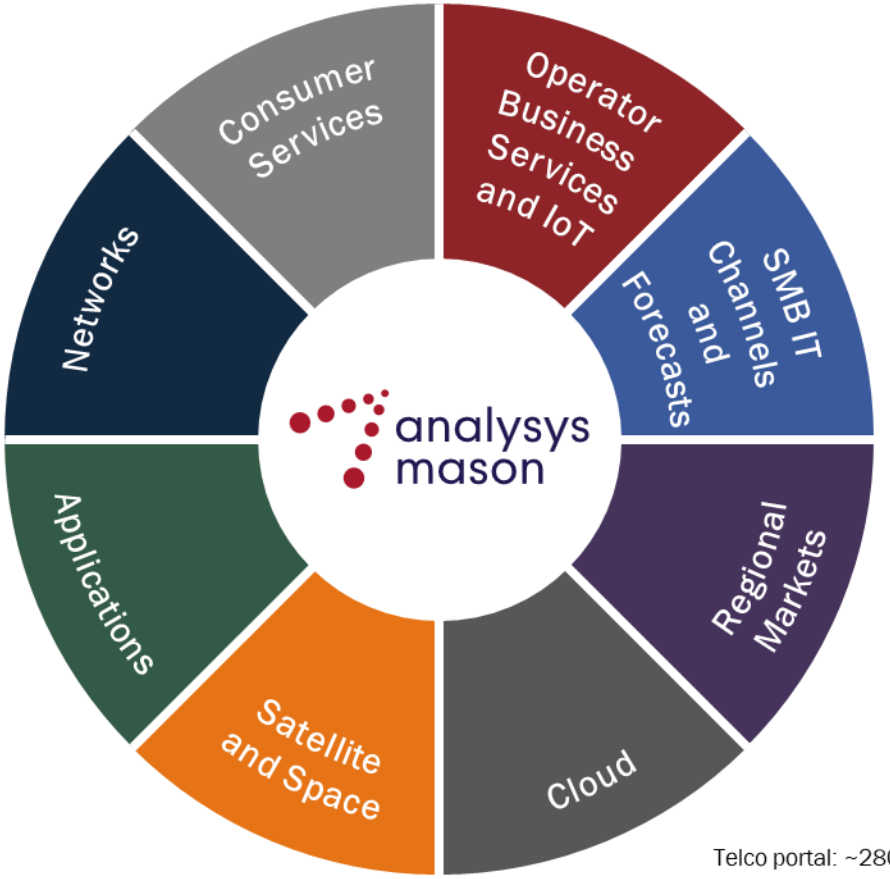

Operator Business Services and IoT
Enterprise Services
SME Services
IoT Services
Private Networks
Cyber Security

SMB IT Channels and Forecasts
SMB Technology Forecaster

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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