



TELECOM API MARKET OUTLOOK AND FORECASTS 2019 – 2026

Sample/Excerpts ONLY – Not Full Report

1.1.1 Key Findings

Following are the key findings of the report:

- Growing at a CAGR of 24.9% over the next 5 years, Telecom API market will reach \$636.66B USD by the end of 2026
- The Internet of Things (IoT) API category will remain a big opportunity area for incumbent carriers
- Mobile network operators are already leveraging Telecom APIs to support Robocall Detection and Unwanted Call Management. Some of these same processes and procedures will become a bridge towards mediation of IoT network authentication and authorization
- The average volume of API transactions for a Tier 1 wireless carrier will significantly increment over the next five years eventually reaching 383 Billion transactions a month on average
- Significant growth rates for Telecom API marketplace will be achieved through changes in certain business practices and also through deployment of SOA, virtualization, SDN, and advancement of IoT in certain key industry segments.

2.0 Telecom API Overview

In this section we present an overview of the Telecom API industry.

Role and Importance of Telecom APIs

Application Programming Interfaces are a well-recognized term within the IT software development community. However, more enterprise organizations (i.e., web-based merchants, web-based service providers, traditional retailers and media companies) are learning and leveraging APIs to collaborate more closely with external partners such as application developers and third-party service providers.

The terms presented in this paper and associated with Telecom APIs are: Telecom Application Development, CPaaS, Programmable Telecom, Communication Enabled Apps, and Embedded Communications

Communication Service Providers (CSPs or carriers) worldwide recognize that collaborating with partners using APIs can be used to generate new sources of revenue, drive innovation, increase competitiveness and retain and attract new customers.

Telecom APIs allow carriers to capitalize on existing network infrastructure and capabilities to create a vast array of business opportunities for carriers worldwide. Carriers have a vast array of under-utilized assets they can leverage to drive incremental revenues. When these assets are integrated within innovative applications, using APIs, they strengthen the value of...

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Telecom APIs Market 2019 – 2026

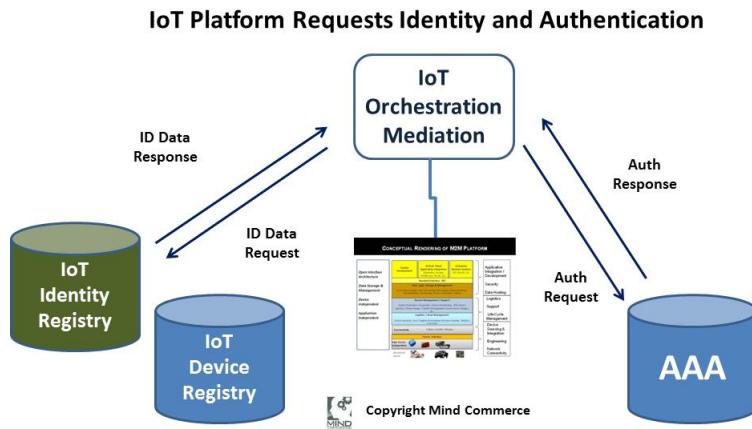


Figure 1: Next Generation CSP Assets driving Telecom API Usage

Copyright: Mind Commerce

The above figure depicts some of the carrier assets that will lead to increasingly more dependence on Telecom API usage for Authentication and Authorization.

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2.1.1.1 Market Opportunities and Challenges

There are many companies that we interviewed as part of developing this report and we're highlighting a few of them in the report. Some companies (such as TeleStax) have engaged with varying degrees of success to develop a CAM marketplace.

By and large, the CSPs remain frozen to the opportunity to develop their own Telecom API Enabled VAS App Marketplace

Telecom API opens up the door for carriers to leverage the data that they already have to offer value-added services where, by definition, they can offer them at a premium and provide some level of differentiation as compared to these over-the-top applications.

Mind Commerce continues to see an opportunity for the carriers to start a VAS Services Consortium

Mind Commerce believes that there is an unmet (or under-met) need wherein carriers provide VAS to their own customers (consumer and enterprise) to both improve top line revenue and margins in the face of bearer services margins that are ever shrinking.

Mind Commerce sees an opportunity for the carriers to start a VAS Services Consortium as part of a CAM.

The challenge, however, is the carriers compete with one another, so they could form something like that where maybe they could collaborate at a certain level, but when it comes to the realization of the apps themselves or the service, that would be problematic because the carriers...

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2.1.2 Embracing Next Generation Use Cases

While growth in support of IP enabled networks has proven to be an excellent source of revenue for some Telecom API vendors, others are focusing on use cases associated with emerging opportunities such as robotics and business automation. Some of those next generation use cases include:

- **Telecom APIs in IoT:** IoT represents a huge and largely untapped market for CSPs, which Mind Commerce sees emerging once carriers begin to fully leverage 5G for IoT apps and services. More specifically, we have identified the opportunity for carriers to act as an orchestrator/mediator within the IoT ecosystem. Uniquely positioned as owner of the primary network to be used for IoT, and provider of data services for humans and machines alike, CSPs have the opportunity to provide various critical services such as IoT authentication, authorization, and accounting. This will include use of Telecom API resources to help manage IoT related access control, permissions, and usage tracking.
- **Telecom APIs in Mobile Edge Computing:** Carriers are also well positioned to leverage Telecom API enabled capabilities in support of many edge computing use cases as MEC is rolled-out to optimize LTE, 5G, and IoT. Many MEC use cases will require support from multiple Telecom API categories such as Location, Presence, Subscriber Data, and QoS in support of zone-based enterprise apps, services, and data analytics. This will create both a challenge and opportunity for CSPs, which will need the assistance of systems integrators for implementation and managed infrastructure services providers for ongoing operations.

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3.0 Global Markets for Telecom APIs

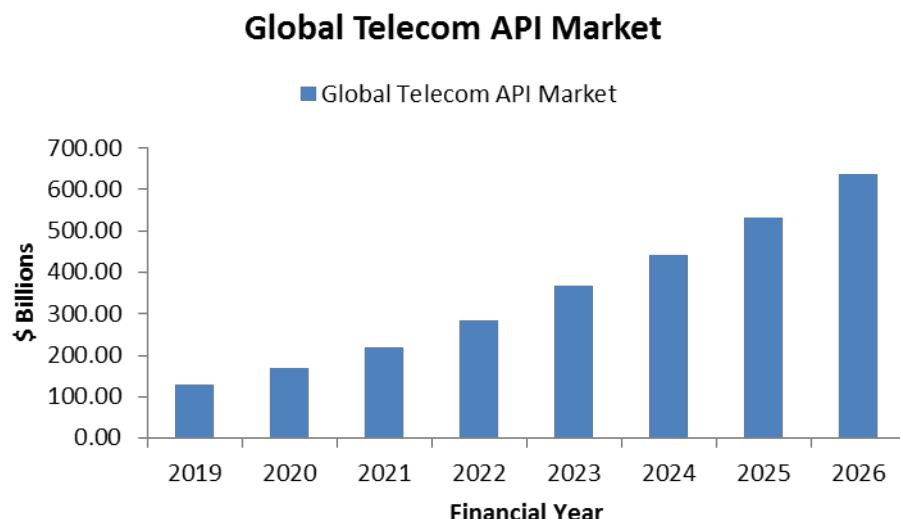


Figure 2: Global Markets for Telecom APIs 2019 – 2026

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Telecom APIs Market 2019 – 2026

Telecom API Market by Service Type

(\$ Billions)	2019	2020	2021	2022	2023	2024	2025	2026	CAGR 2020-2026
Messaging (SMS, MMS, RCS) API	X	X	X	X	X	X	X	X	X
WebRTC API	X	X	X	X	X	X	X	X	X
Payment API	X	X	X	X	X	X	X	X	X
IVR/Voice Store and Voice Control API	X	X	X	X	X	X	X	X	X
LBS and Map API	X	X	X	X	X	X	X	X	X
Subscriber Identity and SSO Management API	X	X	X	X	X	X	X	X	X
Content Delivery API	X	X	X	X	X	X	X	X	X
M2M IoT API	X	X	X	X	X	X	X	X	X
IoT Platform Specific API	X	X	X	X	X	X	X	X	X
IoT Authentication API	X	X	X	X	X	X	X	X	X
Blockchain Specific API	X	X	X	X	X	X	X	X	X
AI Platform Specific API	X	X	X	X	X	X	X	X	X
Robotics Specific API	X	X	X	X	X	X	X	X	X
Analytics API	X	X	X	X	X	X	X	X	X
Call Screening API	X	X	X	X	X	X	X	X	X
Device Information API	X	X	X	X	X	X	X	X	X
QoS API	X	X	X	X	X	X	X	X	X
Do not Disturb API	X	X	X	X	X	X	X	X	X
Edge/Fog Device Specific API	X	X	X	X	X	X	X	X	X
Total	X	X	X	X	X	X	X	X	X

Table 1: Global Markets for Telecom API by Service Type 2019 - 2026

(Copyright: Mind Commerce)

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Telecom APIs Market 2019 – 2026

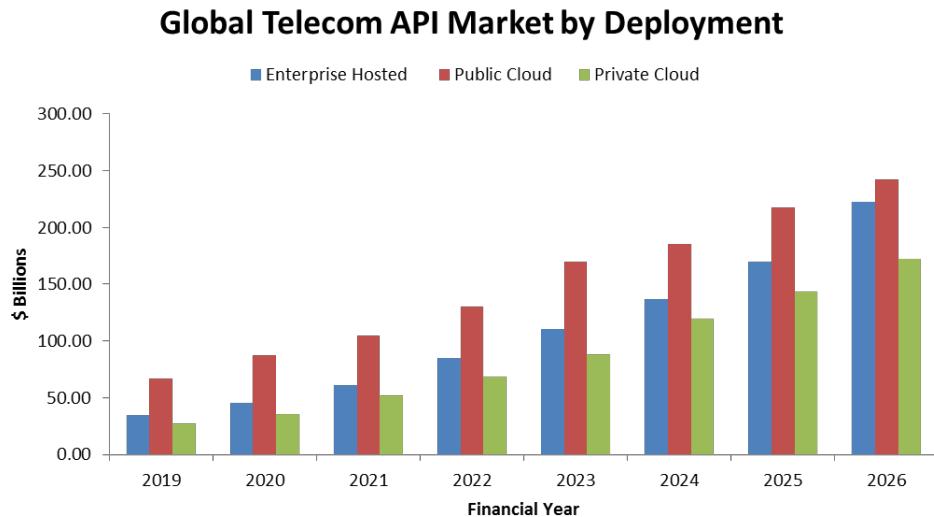


Figure 3: Global Markets for Telecom APIs by Network Technology 2019 - 2026
(Copyright: Mind Commerce)

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Telecom APIs Market by Platform as a Service

Communication Platforms as a Service (CPaaS) is a cloud-based platform that allows developers to include real-time communication features such as voice, video, SMS, IVR, live chat and instant messaging directly into their own applications without having to modify backend infrastructure.

(\$ Billions)	2019	2020	2021	2022	2023	2024	2025	2026	CAGR 2020-2026
CPaaS	X	X	X	X	X	X	X	X	X
UCaaS	X	X	X	X	X	X	X	X	X
Total	X	X	X	X	X	X	X	X	X

Table 2: Global Markets for Telecom API by Communication-enabled Platform as a Service 2019 - 2026
(Copyright: Mind Commerce)

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European Telecom API Market by User Type

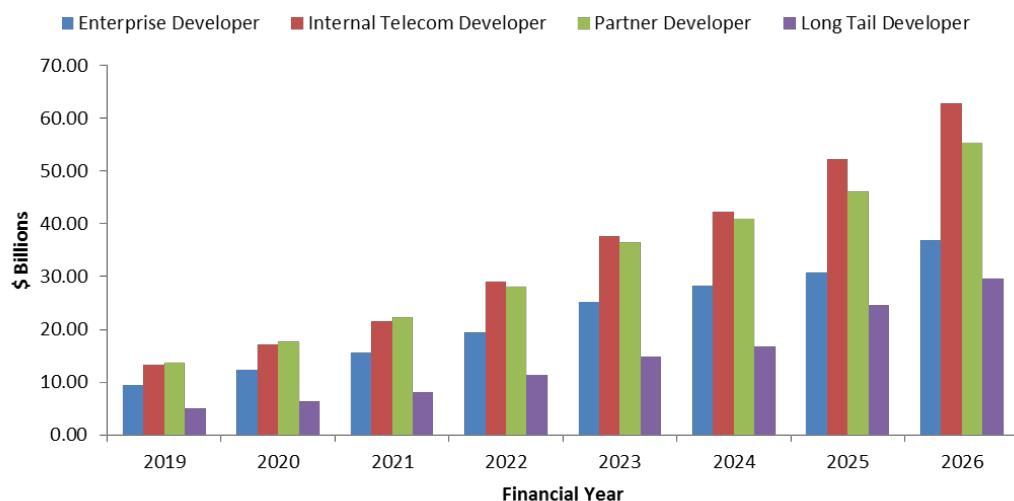


Figure 4: European Markets for Telecom APIs by User Type 2019 - 2026

(Source: Mind Commerce)

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