The future of NaaS and API commercialisation: Bridging the gap between ambition and reality

STL Partners webinar

28th May 2025

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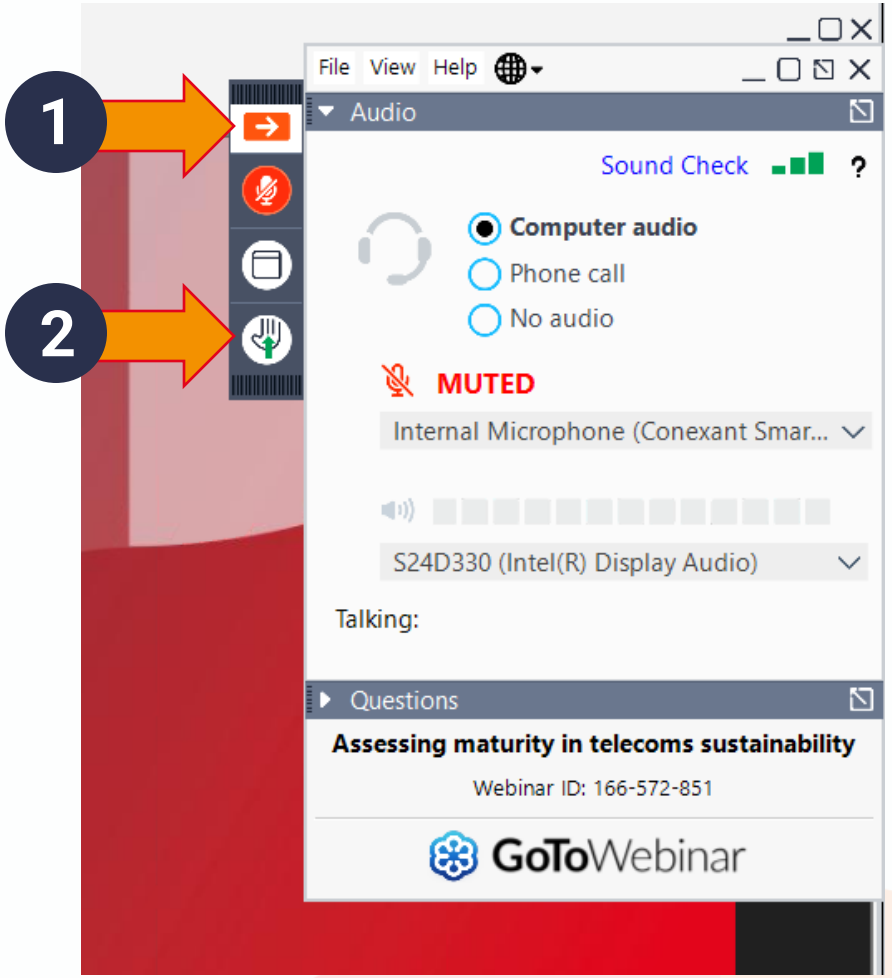
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Agenda

1. **Introduction and housekeeping**
2. **STL presentation: What does the future of NaaS and API commercialisation *really* look like?**
3. **Volt presentation: Why NaaS needs real-time data processing**
4. **Panel discussion and Q&A**
5. **Wrap up**

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- Feel free to type questions throughout the session for the Q&A at the end
    - Any questions that we don’t answer live will be answered offline and shared in a summary Q&A document
- We’ll send you the slides and a recording shortly after the session, please do share with colleagues



Our speakers



MIRIAM SABAPATHY

Senior Consultant

STL Partners



DARIUS SINGH

Consulting Director & Enterprise Practice Lead

STL Partners



ANDREW KEENE

Vice President, Product Management

Volt Active Data



CHETAN NARANG

Principal Innovation Strategy Manager, Technology & Growth

Colt Technology Services

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Telcos are hoping to leverage emerging technologies (e.g. 5G, edge, programmable networks) to drive towards 'telco-as-a-platform'

Enterprise digital transformation is driving adoption of emerging technologies

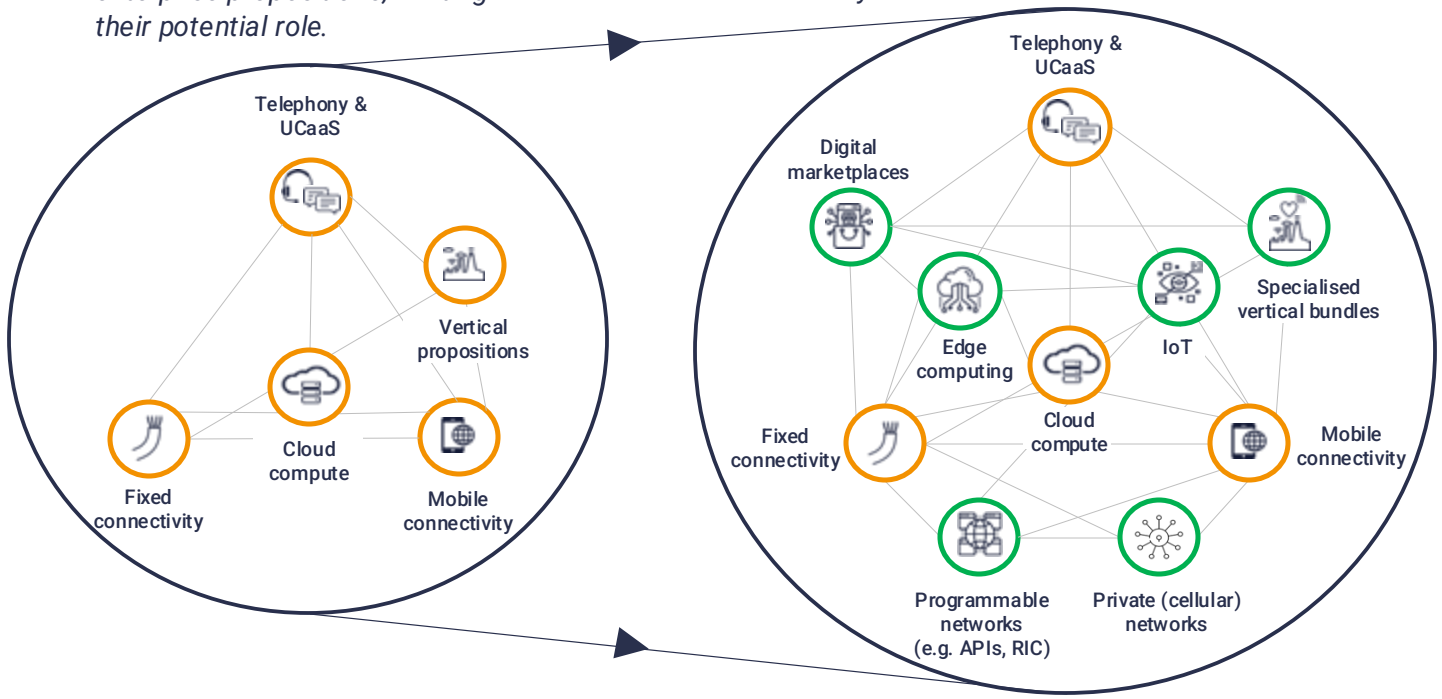
Enterprises are under pressure to cut costs and differentiate from the competition, and they see digital transformation as a necessary step to achieve this.

- Edge computing
- 5G
- Operational applications
- AI/ML
- Next-gen networks
- IoT

Emerging technology is driving a growing ecosystem of devices and use cases in B2B telecom, enabling operators to seek new areas of value beyond connectivity

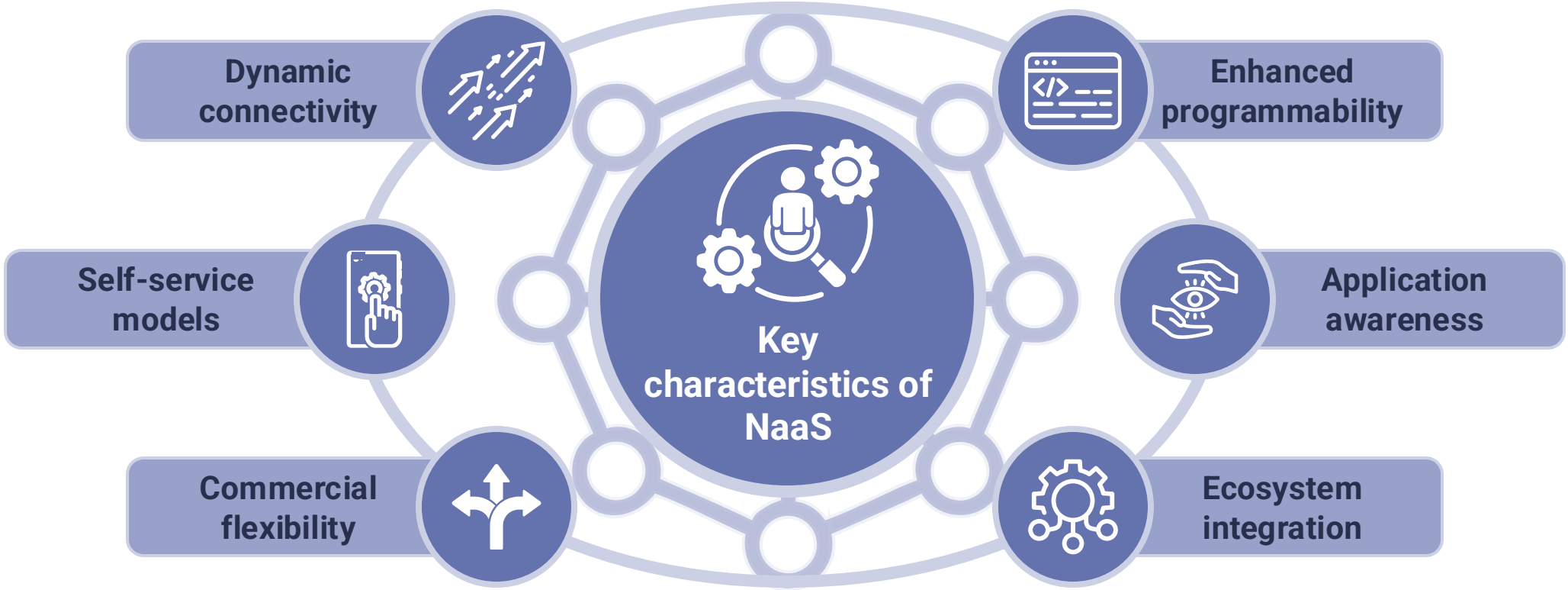
Today: many operators are currently too limited in their enterprise propositions, limiting their potential role.

Future opportunity: telcos can exploit new technology and evolve their role in the ecosystem to play beyond connectivity.



NaaS is a key part of this vision, unlocking new value for telcos through commercial agility

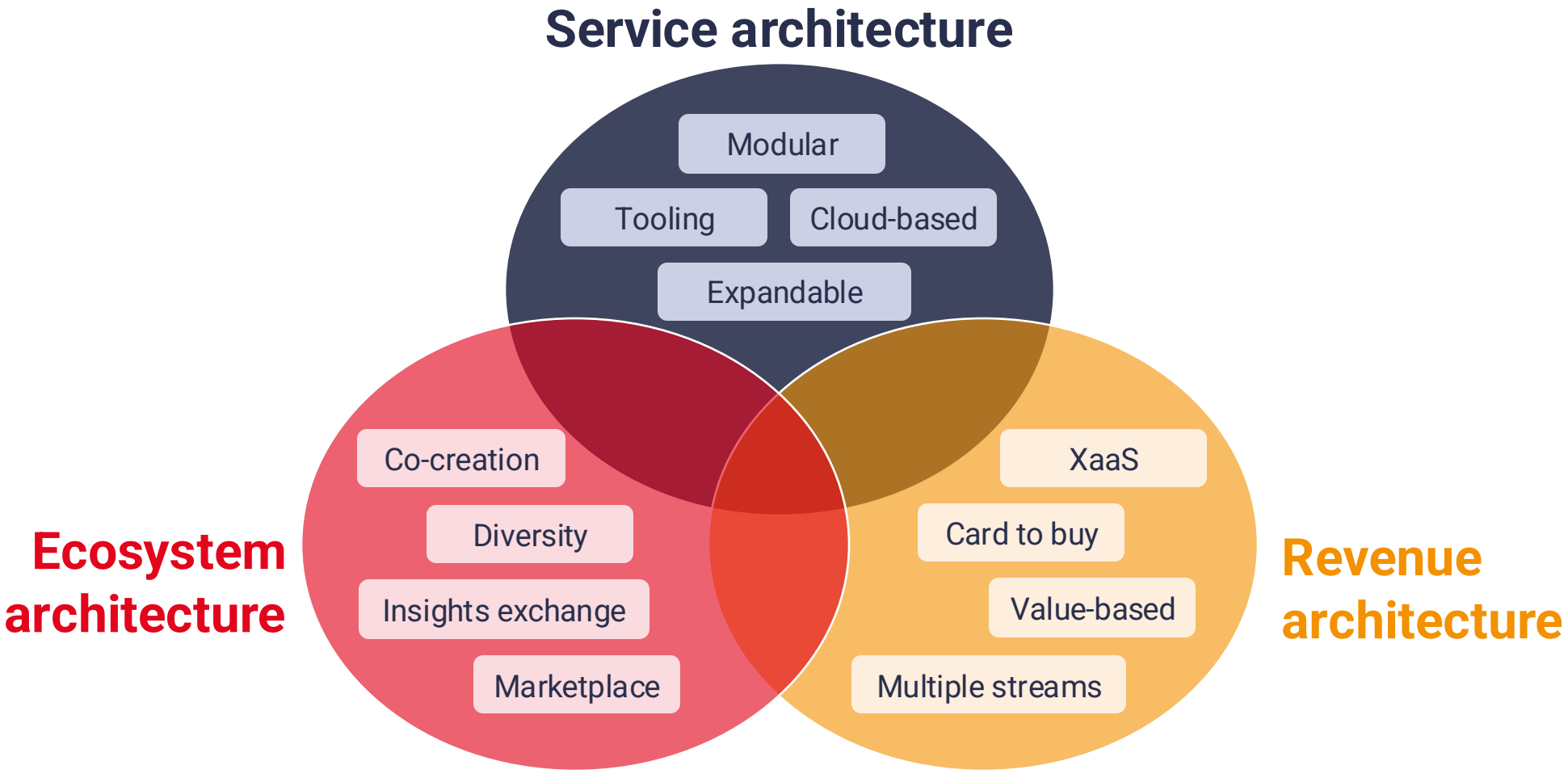
NaaS represents the shift towards a cloud-based platform model for network services…



NaaS is seen as the foundation for next-generation services; both as a standalone NaaS connectivity proposition but also as an enabler for net-new services, such as network APIs.

New service architectures make NaaS technically possible, but operators risk neglecting commercial considerations

To successfully commercialise NaaS, operators must adopt a holistic platform approach addressing three pillars



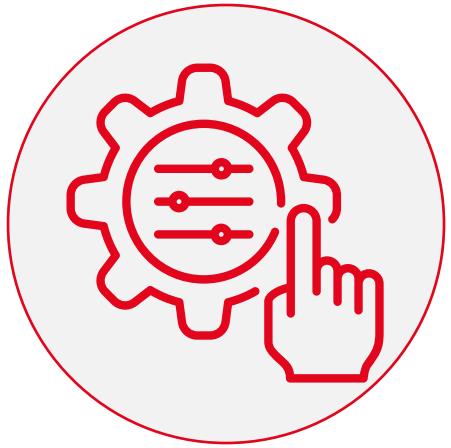
Without clarity on future commercial models, operators will struggle to effectively prepare to deliver and monetise NaaS

What does the future of NaaS and API commercialisation *really* look like?

From our interviews with leading operators globally, three key themes emerged…



1. Dynamic models



2. On-demand models



3. Situational models

Scenario 1: Dynamic models

A future scenario for NaaS commercial models is demand-driven, dynamic pricing

Beyond usage-based models: expanding the NaaS pricing toolkit

Potential pricing models for NaaS & APIs

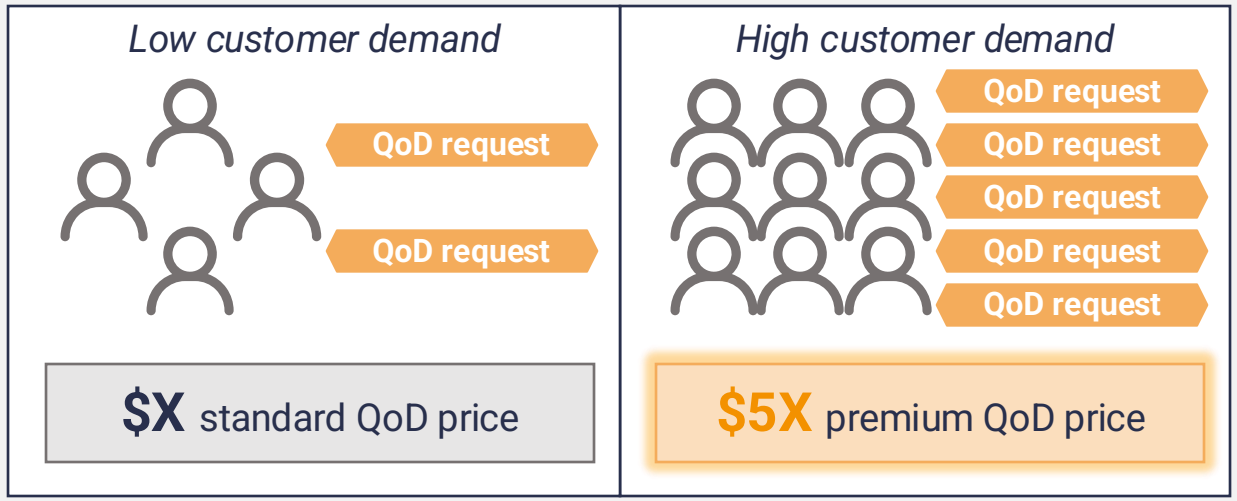
- Usage-based
- Time-based
- Outcome-based
- Tiered subscription plans
- Performance-based
- Event-based

"Today, focus is on pay-per-use models. Given coordination difficulties, it's a simple model to begin with as it's something customers understand and it's easy to aggregate."

Global Director - Open Gateway, Tier 1 operator, Western Europe

Will demand-driven, dynamic pricing unlock new revenue?

Example: Surge pricing for Quality-on-Demand (QoD)



"If users want quality on demand and demand is high – say at a busy football game – we can start to do some bidding on it and see if we can maximise our profit based on users' willingness to pay."

- Vice President - API exposure, Tier 1 operator, Western Europe

Scenario 2: On-demand models

The NaaS vision is centred on end-to-end flexibility, from technical service delivery to commercial customer experience

Enterprises will still require network services on a more permanent basis, they also demand the flexibility to consume services on a short term, scalable, pay-as-you-need basis

NaaS customers must be able to provision and flex the network in real-time across capabilities such as…

- **Connectivity:** to order and activate connectivity services in minutes rather than months
- **Bandwidth:** to scale capacity up (or down) from a base of committed connection bandwidth, in near-real time
- **Route:** to dynamically select a path of choice to meet specific performance parameters
- **Quality of Service (QoS) management:** to adjust the QoS parameters for customer traffic/application management

This dynamism must be extended in the customer-facing experience

- **Service observability**
- **Dynamic SLA management**
- **Granular usage tracking**
- **Short-term contracts**
- **Pay-as-you-use billing**

> "It is about **intent-based connectivity**, so customers want to have **visibility** of their services and the ability to **control** it in real time."

Principal Innovation Strategy Manager, Fixed operator, Europe & APAC

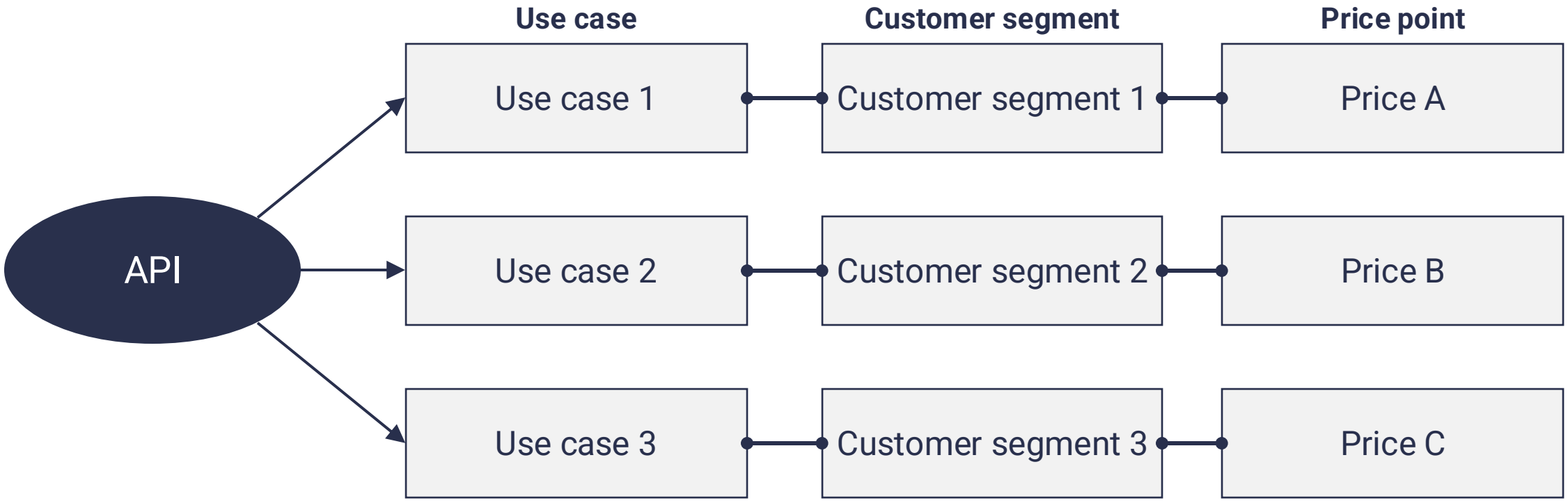
> "NaaS vision centres on creating scalable, **programmable networks**… this means we can change services in 6 minutes not 6 months."

CTO, Business Division, Tier 1 Operator, Western Europe

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Scenario 3: Situational models

Different customer segments and use cases justify different pricing based on the value delivered by the specific API



"We shouldn't think about providing one API with one price, because that's going to feed into the business problem. It's definitely more of a use case approach"

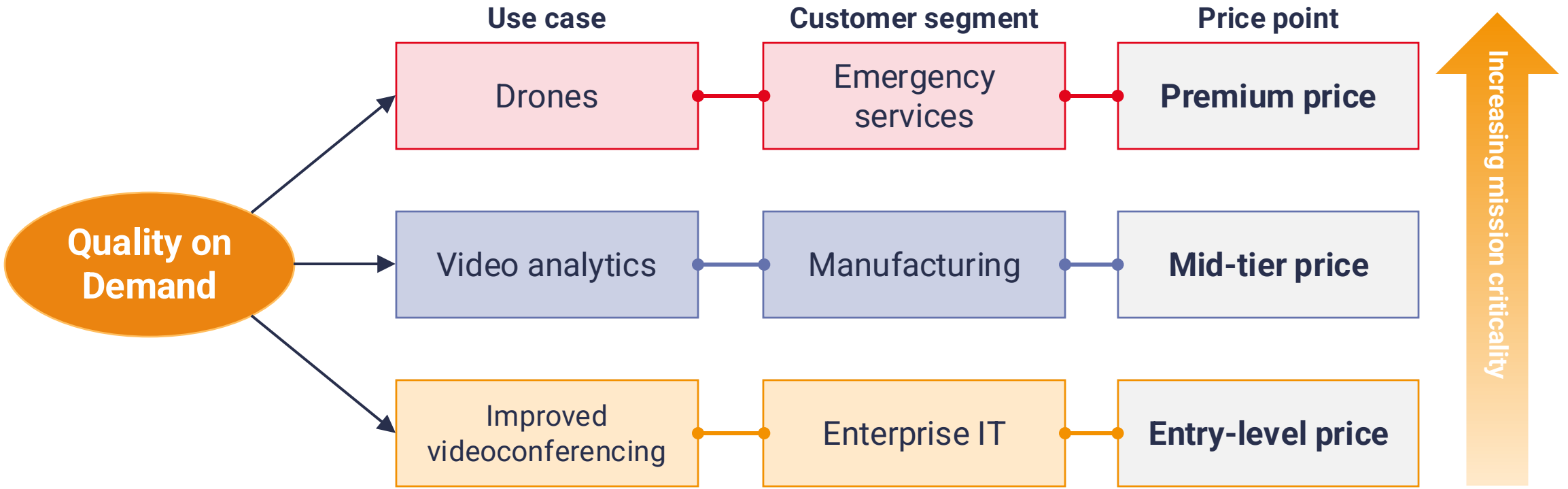
- *Product Manager, NaaS & APIs, Tier 1 operator, Western Europe*

"There are some customers and use cases that are extracting a lot of value from the API, and others where it's just a nice to have. For the mission critical ones, you're adding more value and you can charge more."

- *Global Director - Open Gateway, Tier 1 operator, Western Europe*

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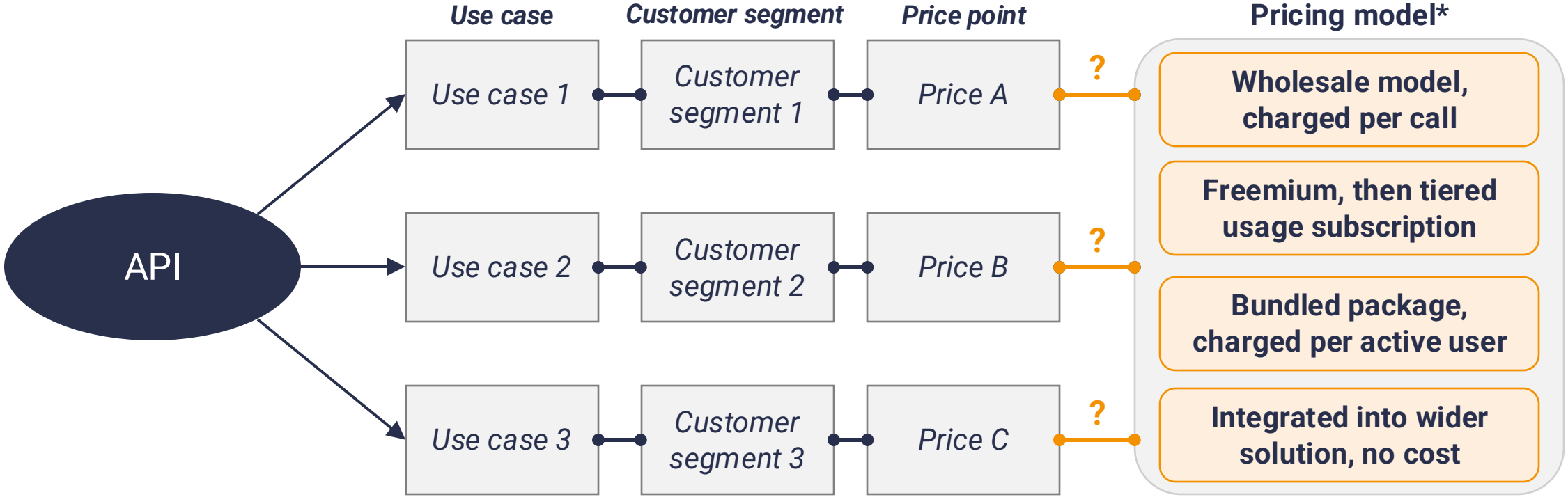
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"We must incentivise customers to drive usage… If customers want to buy more capabilities in the form of APIs or something else, at the end of the day, we should bundle it together and offer a discount"

- *Product Manager, NaaS & APIs, Tier 1 operator, Western Europe*

"There'll be cases where we're bundling APIs with a bigger service, and sometimes we will give them away for free because it's part of a multi-million contract and it's just the icing on the cake."

- *Global Director - Open Gateway, Tier 1 operator, Western Europe*

**: Non-exhaustive*

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Operators must build dynamic technical and commercial foundations to achieve their future NaaS vision

Future NaaS vision	Present reality
Adaptable commercial models and dynamic value-based pricing	Platforms built/repurposed for traditional commercial models (e.g. for identity APIs, simple subscriptions)
Scalable usage, freeing customers from rigid contracts	Limited ability to support granular, dynamic service configurations
Flexible and customisable offerings defined by customer/application requirements	SLAs remain uniform across network services, and are not application-aware
Multiple revenue streams from one service component; commercial models to encourage usage	Risk of “one API, one price” mindset dominating

So, how should operators effectively prepare to commercialise and monetise NaaS and APIs?



Avoid technical debt and invest in new platforms for true end-to-end dynamism



Enable seamless, partner-centric monetisation and B2B2X collaboration



Build real-time data capabilities across your NaaS stack

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Why NaaS needs real-time data processing

Andrew Keene
VP Product Management



2 Key Challenges for NaaS Adoption

Understanding true value to Enterprises

Ensure network services are delivered reliably and efficiently

Understanding the context of network data in **REAL-TIME**!



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Volt Active Data

- The only real-time data processing platform proven to power solutions that enable instant decisions and actions – efficiently at scale and without fail
- 16+ years being at the forefront of the real-time ecosystem
- Global user-base

Volt-powered applications make decisions on **billions** of mission-critical events every day

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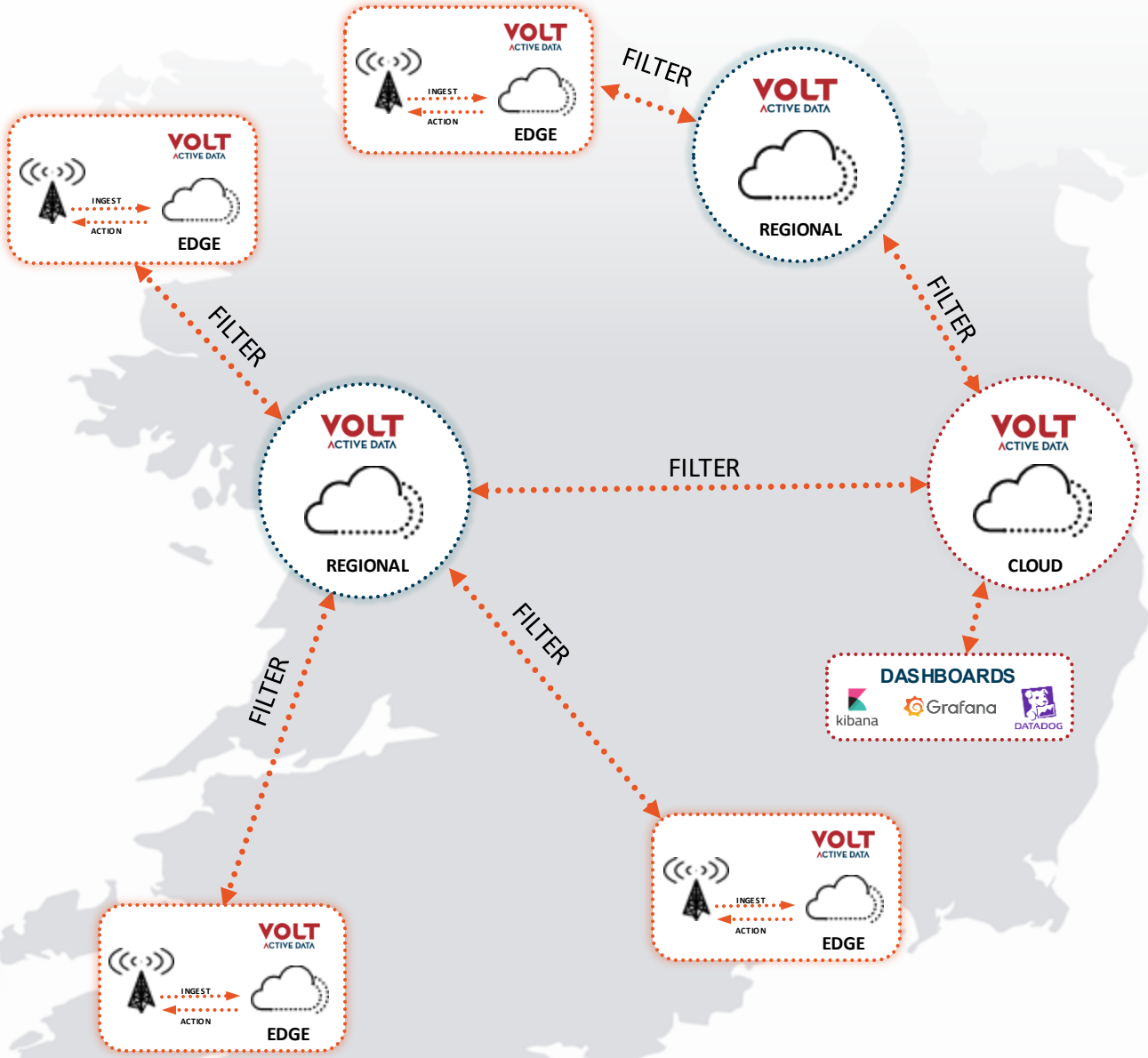
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Tiered Data Platform for Real Time NaaS Enablement



Leaf tiers satisfy the **LATENCY SLAS**

Higher levels used for more **VISIBILITY** purposes

SAVES DATA TRANSMISSION & STORAGE COSTS by filtering out useful data close to the source and at each level.

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Our panel discussion

Moderator



DARIUS SINGH

Consulting Director & Enterprise Practice Lead

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Panellists



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For our Q&A...

Please submit any questions using the GoToWebinar control panel



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Thank you for joining!

All registrants will be receiving the link to the recording and slides shortly to watch back or to share with colleagues, plus a Q&A write-up in due course.

For any other questions, please contact:

- Miriam Sabapathy, *miriam.sabapathy@stlpartners.com*
- Jonas Topp-Mugglestone, *jonas.topp-mugglestone@stlpartners.com*