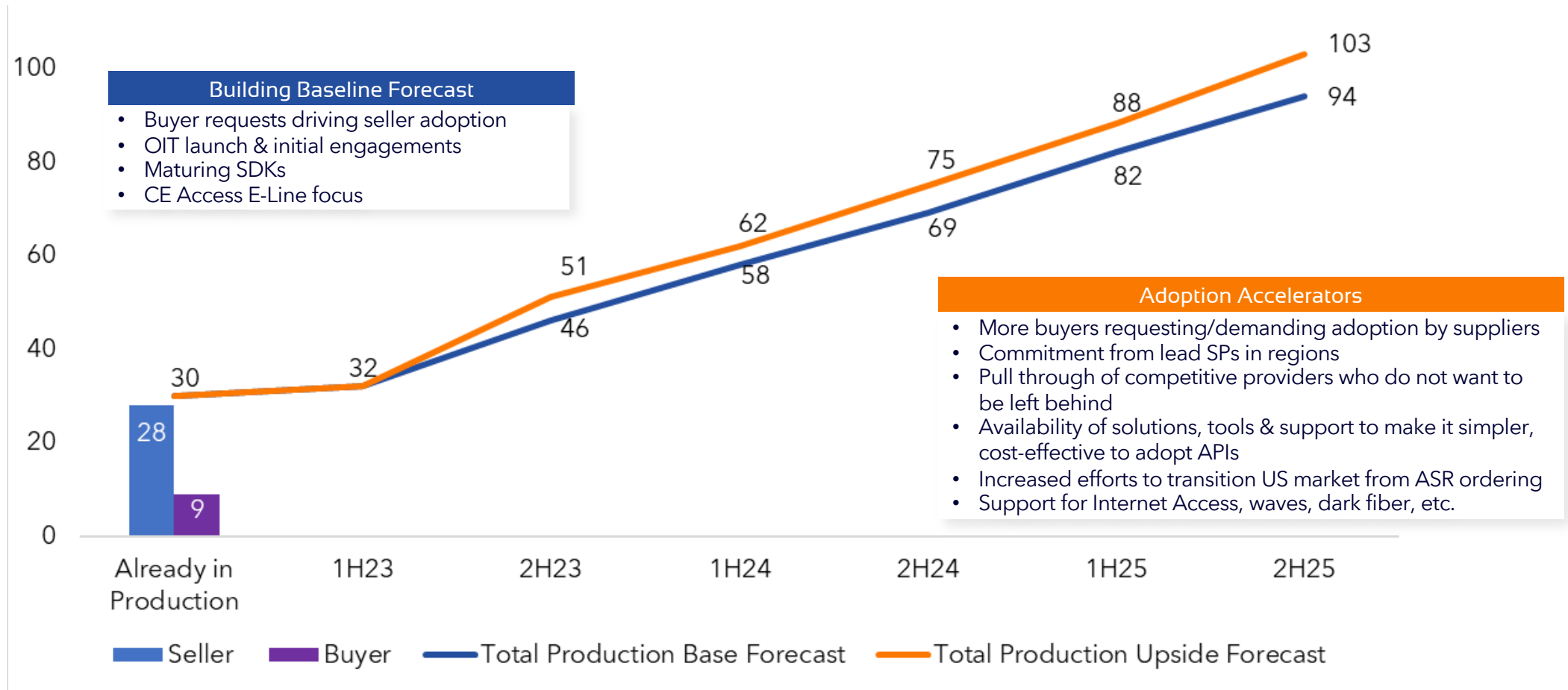# LSO API Adoption

Global NaaS Event
By MEF

Stan Hubbard
MEF, Principal Analyst

LSO API Adoption Forecast

135+ service providers are now in some stage of the LSO API adoption lifecycle. MEF forecasts companies in production will increase rapidly from **30 today to 69+ by the end of 2024** before continuing to surge ahead to **94 – 103+ by the end of 2025**.

Building Baseline Forecast
- Buyer requests driving seller adoption
- OIT launch & initial engagements
- Maturing SDKs
- CE Access E-Line focus

Adoption Accelerators
- More buyers requesting/demanding adoption by suppliers
- Commitment from lead SPs in regions
- Pull through of competitive providers who do not want to be left behind
- Availability of solutions, tools & support to make it simpler, cost-effective to adopt APIs
- Increased efforts to transition US market from ASR ordering
- Support for Internet Access, waves, dark fiber, etc.

Chart data points:
- Already in Production: Seller 28, Buyer 9, Total 30
- 1H23: 32
- 2H23: Base 46, Upside 51
- 1H24: Base 58, Upside 62
- 2H24: Base 69, Upside 75
- 1H25: Base 82, Upside 88
- 2H25: Base 94, Upside 103

Legend: Seller | Buyer | Total Production Base Forecast | Total Production Upside Forecast

LSO API Adoption By Stage Through Production

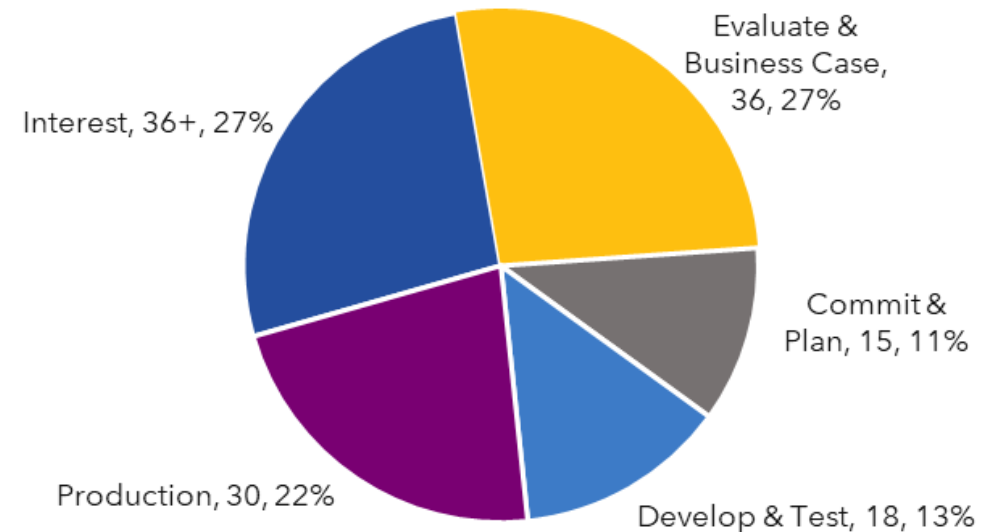| Interest | Evaluate & Business Case | Commit & Plan | Develop & Test | Certify | Production |

MEF is now tracking 135+ companies in the LSO API adoption lifecycle – – up 45+% since July 2022.

- **63** are in commit, plan, development, test, or production stages.

Of the 30 companies in production today, at least 9 are in production with multiple partners.
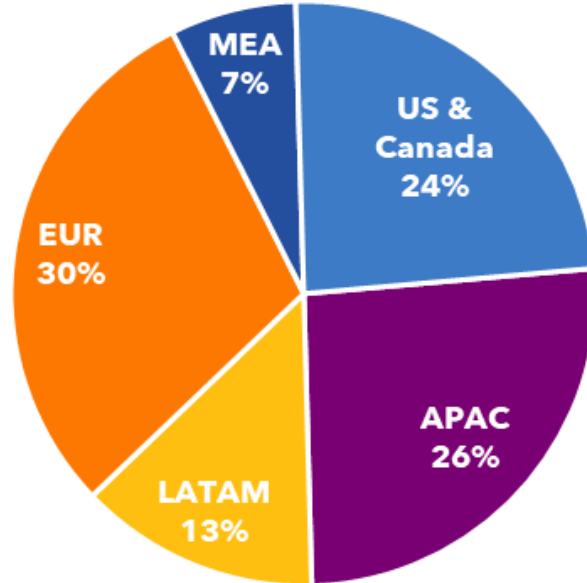
- **36** companies appear to be in the evaluate or business case stages, with many close to committing to working with specific LSO solution providers and partners.

- **36+** companies appear to be in at least the interest stage. Many of these already have had discussions with one or more potential partners. Numerous SPs currently in the interest stage factor into our 2025 baseline and upside forecasts, but we need to learn more details from them to have a better sense regarding the likelihood and timing of implementations.

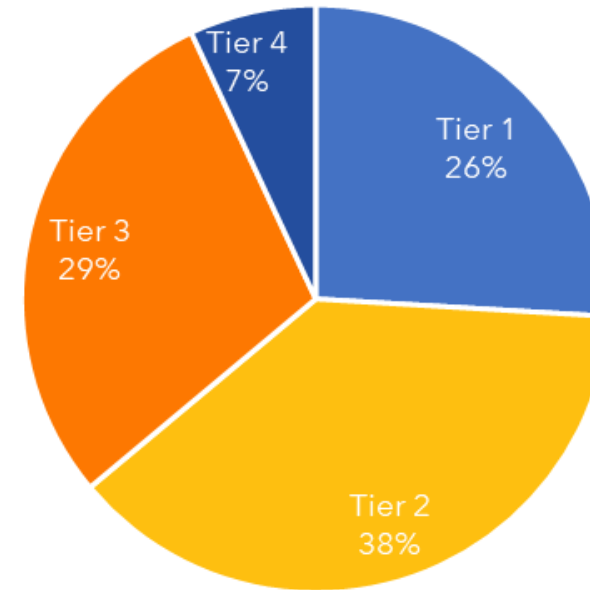## Service Provider Adoption Stage

Interest, 36+, 27%
Evaluate & Business Case, 36, 27%
Commit & Plan, 15, 11%
Develop & Test, 18, 13%
Production, 30, 22%

LSO API Adoption by Region & Service Provider Tier

Service Providers in All Stages of Adoption Lifecycle - by Region

MEA 7%
US & Canada 24%
EUR 30%
LATAM 13%
APAC 26%

Service Providers in All Stages of Adoption Lifecycle - by Tier

Tier 4 7%
Tier 1 26%
Tier 3 29%
Tier 2 38%

63 Companies Committed or in Production w/LSO APIs

30 In Production

AT&T · axnet | AXTEL NETWORKS · Bloomberg · China unicom 中国联通 · colt

consoleconnect PCCW Global · DCconnect Technology · eunetworks · FASTWEB un passo avanti · HGC GLOBAL COMMUNICATIONS

LUMEN · orange · ORCHEST · RETELIT · ROGERS

SPARKLE · Telia · Telefónica Global Solutions · TELUS Partner Solutions · ufinet

VOCUS · zayo

33+ Committed to Production

CMC NETWORKS Our Vision. Your Future · CONVERGE ICT SOLUTIONS INC.

T (Deutsche Telekom) · expereo

GlobalConnect · proximus

STARHUB · tigo business A solution for every company

TIME · TM

verizon

Contact stan@mef.net to have your logo included.

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