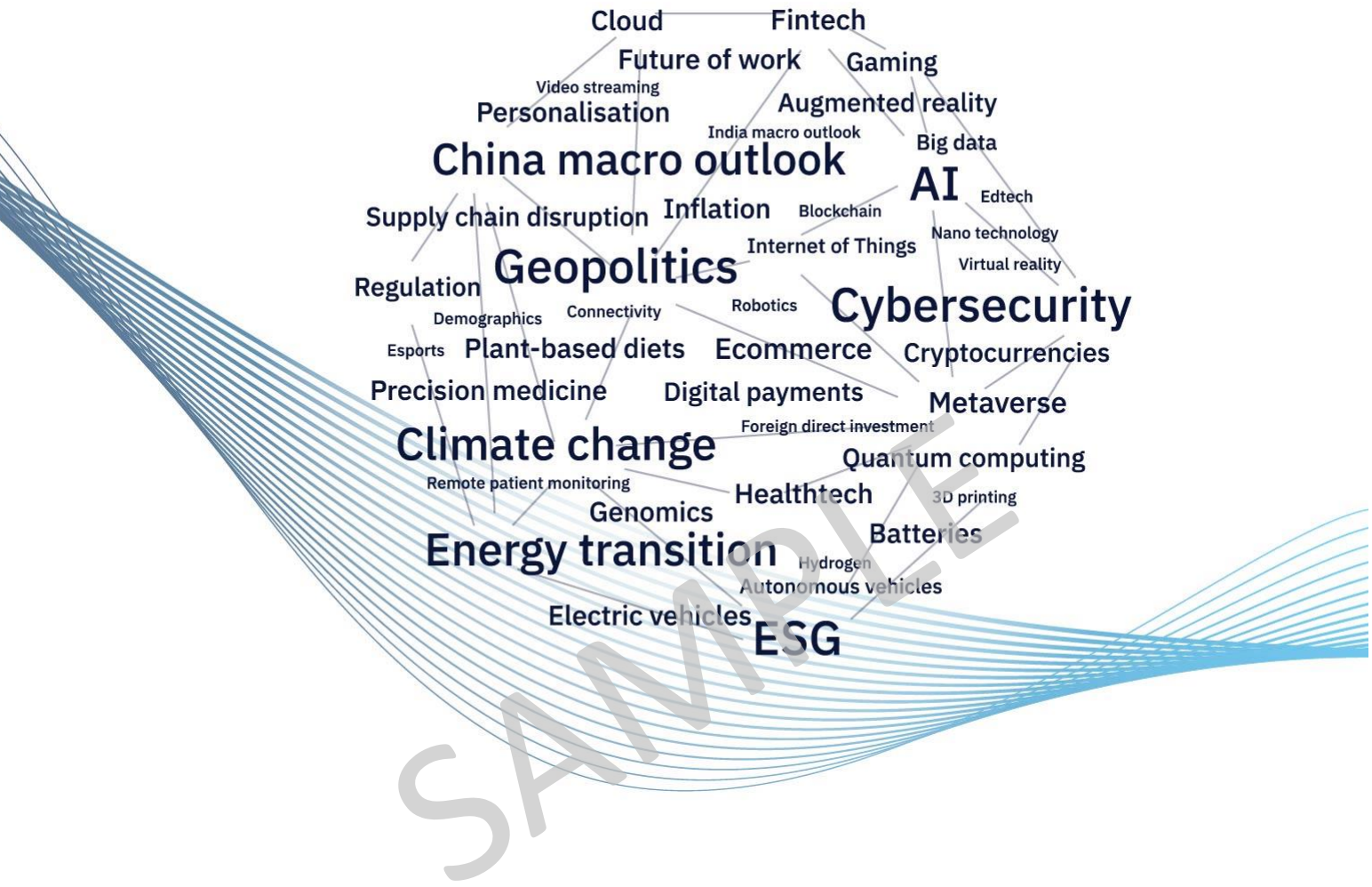

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Strategic Intelligence
Technology

GDTMT-TR-M575
December 5, 2024

Tech Predictions 2025

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- The report identifies and analyses 25 themes that will impact every industry in 2025.
- Each theme has been classified into three groups: technology, macroeconomic, and ESG.
- The report includes quantitative and qualitative predictions for each theme in 2025, including market forecasts.

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Executive Summary

The top 25 tech themes for 2025

This report identifies the top 25 tech-related themes that will impact every industry in 2025. For each theme, we offer a set of predictions, identify winners and losers, and point you to further reading.

These 25 themes have been classified into three categories: pure technology themes, ESG themes, and macroeconomic themes. In the following pages, we rank the most disruptive themes in order of importance, with artificial intelligence (AI), the US-China trade war, and ESG as the top three themes for 2025.

Why themes are important

Our research shows that companies who invest in the right themes become success stories; those who miss the big themes impacting their industry will fail. Given that so many themes are disruptive, it is easy to be blindsided by industry outsiders invading your sector.

So, to help our clients gain a competitive advantage, GlobalData has developed its *Strategic Intelligence Solution*, a single, integrated global research platform that provides an easy-to-use framework for tracking all strategic issues—or themes—impacting all companies across all industries.

How to use this report

Our strategic intelligence analysts assess how well companies are positioned for the future based on their competitive position in the main themes disrupting their sector. To do this, we produce three tiers of strategic reports:

- **Single theme:** These reports offer in-depth research into a specific theme (e.g., artificial intelligence).

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Inside

Technology themes

- Artificial intelligence
- AI chips
- AI regulation
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- Internet of Things
- Quantum computing
- Robotics
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- The future of connectivity
- The future of mobility
- The future of work
- The space economy
- Video streaming

ESG themes

- ESG
- Climate tech

Macroeconomic themes

- US-China trade war
- Critical minerals
- Generation Z

Related reports

- Tech, Media, & Telecom Themes 2025

Report type

- Single theme
- **Multi-theme**
- Sector scorecard

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Top Themes for 2025

This *Tech Predictions 2025* report identifies the top 25 tech-related themes that will impact every industry in 2025. For each theme, we offer a series of predictions, identify winners and losers within the tech space, and direct you to further reading.

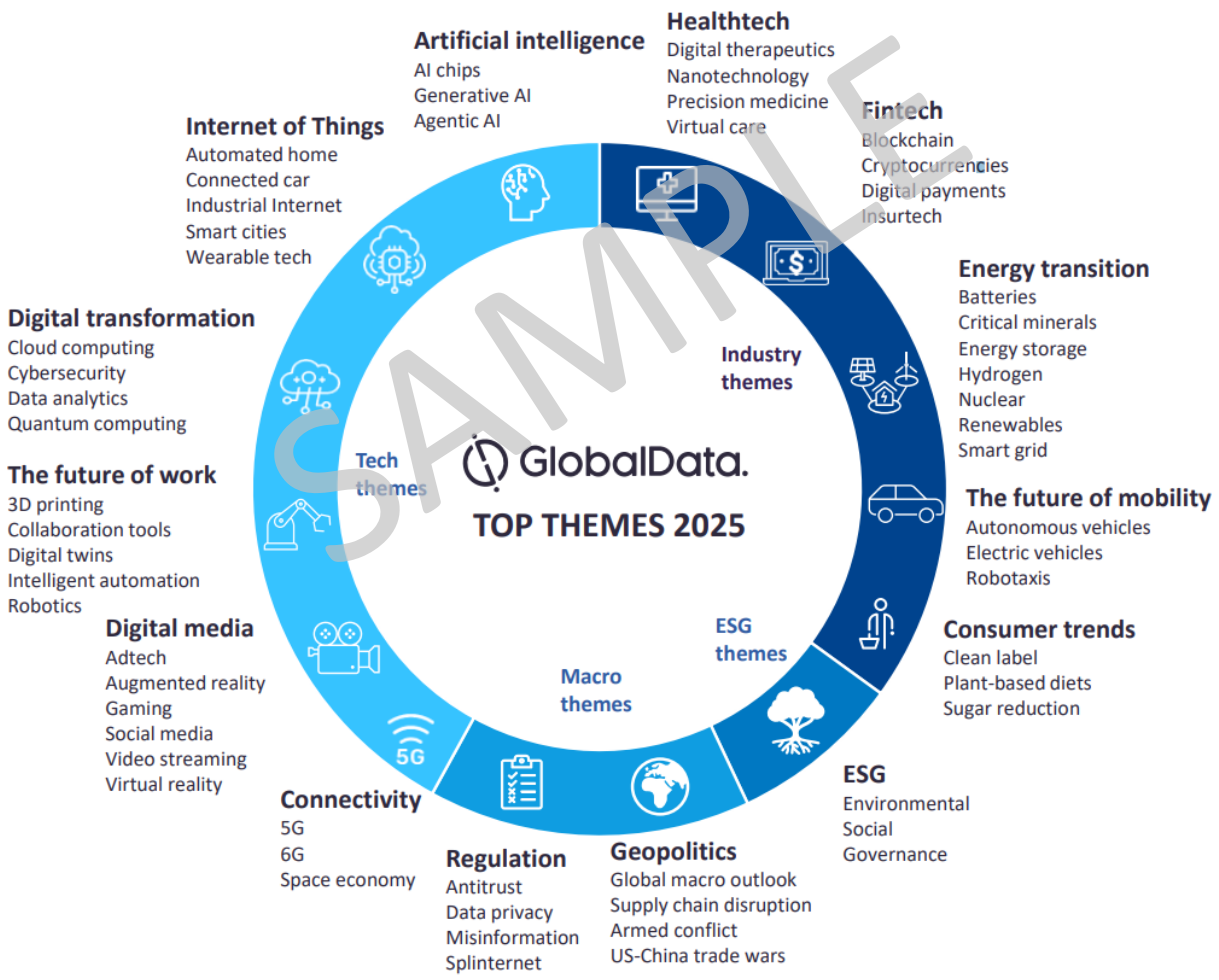
Viewing the world's data by theme helps you make important decisions

At GlobalData, we track all themes impacting all companies across all sectors. Understanding the themes set out in this report will help you outperform your peers in 2025.

The graphic below depicts our 2025 theme map. It highlights the big themes driving profits across industries and is the result of a series of interviews with senior industry executives and investors, reflecting an up-to-date view of the issues that keep them awake at night. Our 2025 theme map covers not only disruptive tech themes but also ESG, macroeconomic, and regulatory themes.

The biggest themes driving growth in 2025

What keeps senior industry executives awake at night?



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Source: GlobalData

Over the following pages, we look at 25 of the most important themes from the above theme map, classified into three groups: pure technology themes, ESG themes, and macroeconomic themes.

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Artificial Intelligence

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The AI market will reach $XX trillion by 2030

GlobalData estimates that the total AI market will be worth over $XX trillion by 2030, though the projected growth will not come without its challenges. The sector will face short- to medium-term obstacles, including rising data center demand, increased hardware costs, and limited availability of graphic processing units (GPUs). Cash-rich tech companies like Microsoft, OpenAI, and Amazon will be able to handle such obstacles.

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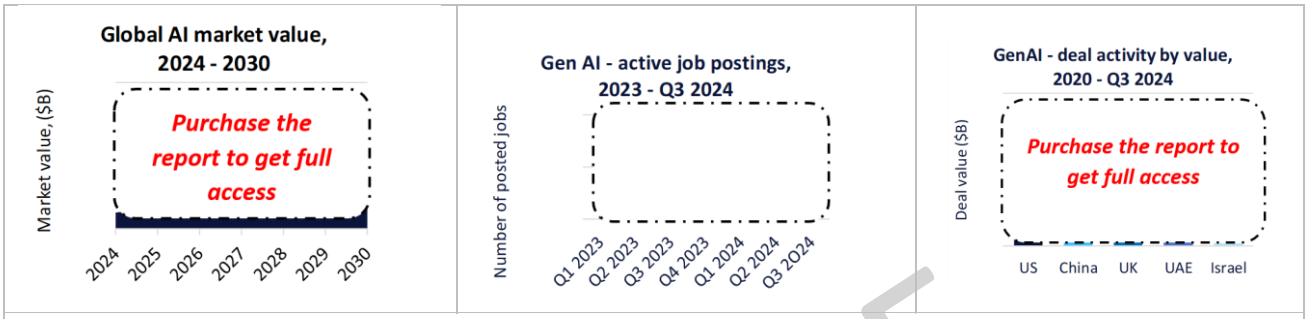

Source: GlobalData

Winners and losers

- **Winners**: Companies offering enterprise AI tools and AI-powered workflow tools, including Alibaba and Alphabet among others.
- **Losers**: Companies that fail to implement AI strategies and have not prepared for upcoming AI regulation.

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Top 3 Theme

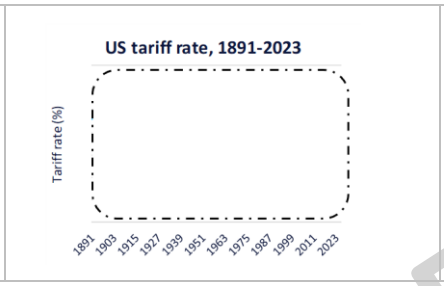
Back to contents

Macroeconomic Theme

US-China Trade War

The second Trump administration will take economic action from day one

With political capital and a united government, the President-elect could make a radical start, imposing XX% to XX% baseline tariffs on global imports, XX% on Chinese imports, and XX% on certain Mexican imports. Tariffs may come in on day one through an executive order, but federal agencies or Congress may challenge their duration and degree later. The trade war with China has received bipartisan support since Trump's first term and will continue into his second. President Biden's imposed and proposed tariffs on Chinese semiconductors, solar panels, biotech, electric vehicles, and connected vehicles tariffs will stay in place beyond 2025.



Sources: US Census Bureau, TS Lombard, Trading Economics.

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Winners and losers

- **Winners**: There will be no winners from a prolonged US-China trade war.
- **Losers**: All tech, media, and telecom (TMT) companies will feel the inflationary pressures of the Trump administration's tariff policy.

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ESG

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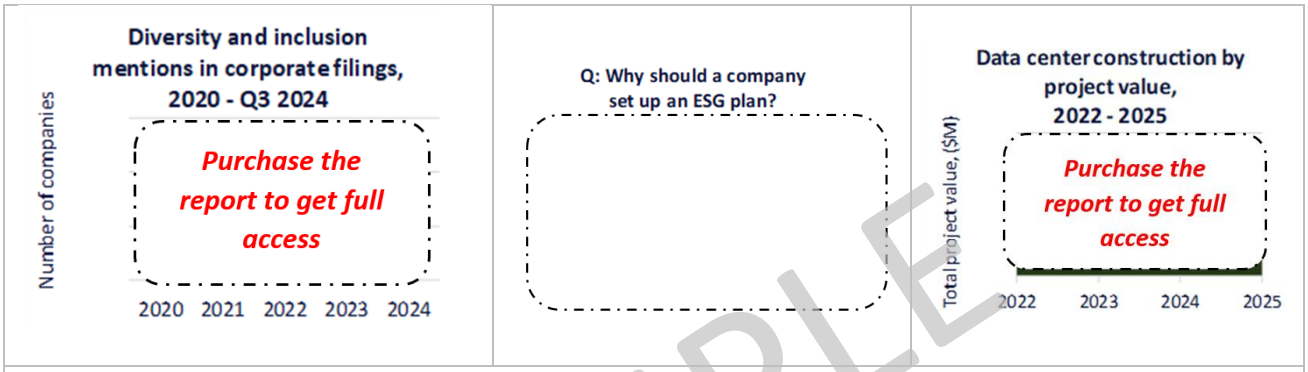
Environmental, social, and governance (ESG) factors are essential to consider when measuring the sustainability of a country or company. The increase in global ESG-related regulation implies that governments want businesses to take ESG risk more seriously.

Big Tech's climate headache will worsen

Big Tech faces two significant climate challenges. The first is the impact of the climate on data centers. More frequent extreme weather events like droughts will likely disrupt data center operations and chip production, which are water-intensive. The second challenge is the impact of data centers on the climate. Total data center electricity consumption is expected to reach XX terawatt hours (TWh) by 2026, double its 2023 figure, according to the International Energy Agency (IEA). In 2025, Big Tech must invest in low-carbon technologies, such as solar and wind power, biofuel, and nuclear, to power data centers.



Source: GlobalData, GlobalData ESG sentiment polls Q3 2024, N = 350 respondents.

Winners and losers

- **Winners**: Companies that continue to strengthen their long-term ESG strategy.
- **Losers**: Companies that ignore their ESG responsibilities and fail to deliver on their ESG marketing promises and fail to set out a clear ESG strategy.

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AI Chips

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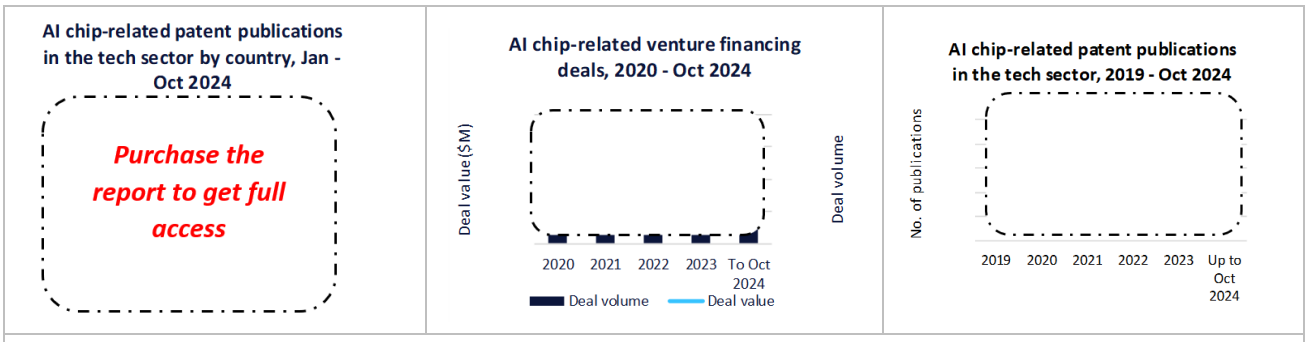
GlobalData defines an AI chip as any semiconductor integrated circuit designed to perform AI tasks more efficiently, thereby reducing the time taken to, for example, process the large data sets associated with machine learning. As AI has advanced, traditional computing hardware has proven inadequate for the demands of sophisticated algorithms, necessitating the development of chips specifically tailored for AI tasks.



Source: GlobalData

Winners and losers

- **Winners**: The leading companies in each of these categories: AI chip designers (Nvidia and AMD, among others); AI chip foundries (TSMC); and chip equipment makers (ASML and Applied Materials, among others).
- **Losers**: The two leading integrated device manufacturers—Intel and Samsung Electronics—are not currently well-positioned in the AI chips race.

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AI Regulation

Back to contents

Companies will struggle to comply with the EU AI act

The European Parliament has approved the EU AI Act, allowing the bill to be fully applicable (after its grace period) in August 2026. Rules on prohibited AI systems will come into effect in early 2025, with generative AI systems facing requirements by August 2025. The rest of the act comes into full effect by August 2027, giving firms just two years to comply. Despite the phased approach and grace period, industry experts have expressed concerns. These include a lack of understanding of the act, a shortage of AI skills, and the complexity of the act itself. While companies that have invested in responsible AI programs may have a head start, implementing continuous monitoring, algorithmic audits, and improved data quality will pose challenges for businesses.

Key phases of the EU AI act:

Percentage of experts who think companies will not be ready to meet the requirements of the EU AI act

according to the MIT Sloan Management Review and Boston Consulting Group

Source: GlobalData, MIT Sloan Management Review, Boston Consulting Group.

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Winners and losers

- **Winners**: Organizations that have adopted a responsible AI strategy.
- **Losers**: Big Tech will face the strictest regulatory scrutiny. Smaller organizations that lack the resources and regulatory expertise to comply with new regulations will struggle.

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Augmented Reality

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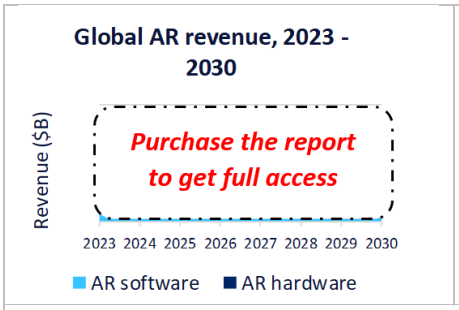
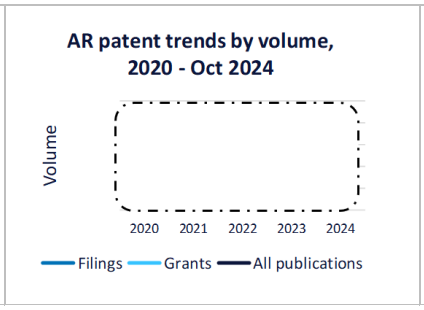
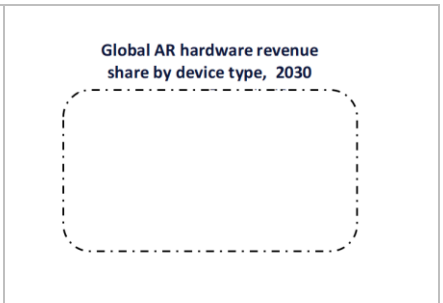
The global augmented reality market will be worth $XX billion in 2025

Augmented reality (AR) technology allows the user to see the real world overlaid with digital data. It is growing in popularity among both consumers and enterprises. According to GlobalData forecasts, the global AR market will be worth over $XX billion in 2025, up from $XX billion in 2024.







Source: GlobalData

Winners and losers

- **Winners**: Apple and Samsung Electronics among others.
- **Losers**: Consumer electronics companies that fail to build a viable AR ecosystem, incorporating both hardware and software.

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Batteries

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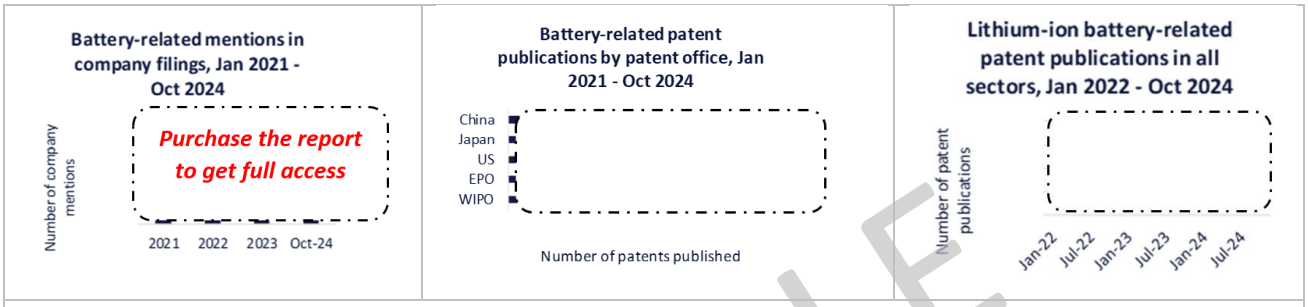
A battery is a container consisting of one or more electrochemical cells in which chemical energy is converted into electricity. Batteries are a critical facilitator of many technologies, from electric vehicles (EVs) to climate tech. GlobalData predicts the lithium-ion (Li-ion) battery industry will reach $XX billion in revenues by 2035, growing at a compound annual growth rate (CAGR) of XX% from $XX billion in 2023.

Battery material recycling will become a core part of the industry

ESG pressures, mineral supply volatility, and Chinese control of the battery supply chain will drive battery makers to invest heavily in battery material recycling: reusing materials from spent batteries. A circular battery industry will emerge by 2030 once there is an abundant supply of spent battery material. The US, led by Redwood Materials, and Europe, led by Umicore, will spearhead this trend. European recyclers will gain from the EU's new battery recycling rules aiming for XX% lithium recovery from recycled batteries by 2027 and XX% by 2031.



Source: GlobalData. WIPO stands for World Intellectual Property Organization, while EPO stands for European Patent Office.

Winners and losers

- **Winners:** Li-ion battery manufacturers like CATL, BYD, and LG Energy Solution that also invest in sodium-ion battery manufacturing.
- **Losers**: Battery manufacturers that fail to invest in battery material recycling.

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Biotech

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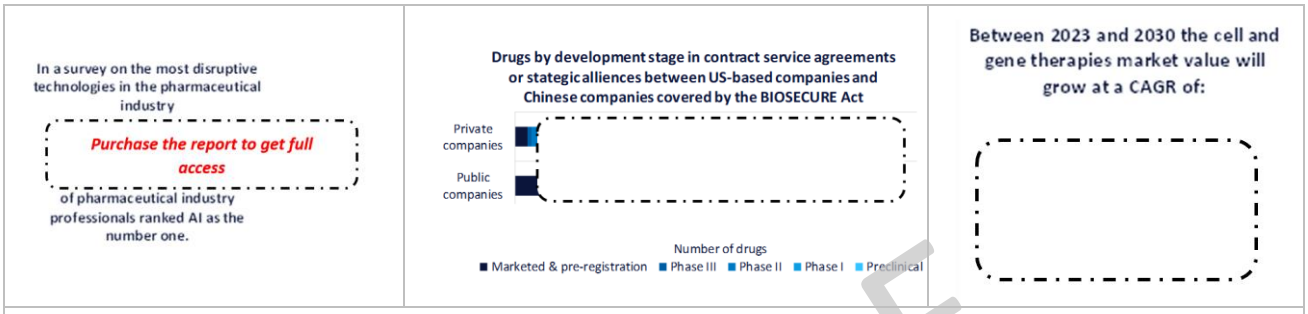
AI and big data will revolutionize the biotech industry

AI and big data are poised to revolutionize the entire pharma value chain, from drug discovery and development to commercialization. In research, for example, AI can help to process large quantities of data to identify novel drug targets, discover biomarkers, and evaluate laboratory and clinical efficacy and safety outcomes. GlobalData's drugs database reveals that currently, over XX drugs have been developed or repurposed using AI. A noteworthy application of AI is in designing monoclonal antibodies, including Imneskibart (AU-007) by Aulos Bioscience, currently in Phase 2 clinical trials for treating various cancers. Co-developed with Biolojic Designs, AU-007 is one of the first computationally designed monoclonal antibodies to be tested in a clinical trial. As more companies adopt AI-driven approaches, drug development will become faster with reduced costs.



Source: GlobalData. Note: The second figure includes all contract service agreements, licensing agreements, and partnership deals globally between Complete Genomics, WuXi Biologics Cayman, WuXi AppTec, and BGI Genomics or their subsidiaries and US-based companies.

Winners and losers

- **Winners**: Companies that integrate AI and gene editing, CRISPR-based companies, cell therapy innovators, US-based pharmaceutical manufacturing companies, and those poised to take over contracts from China in places such as South Asia.
- **Losers**: Companies failing to integrate AI; Chinese pharmaceutical manufacturers and suppliers.

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Climate Tech

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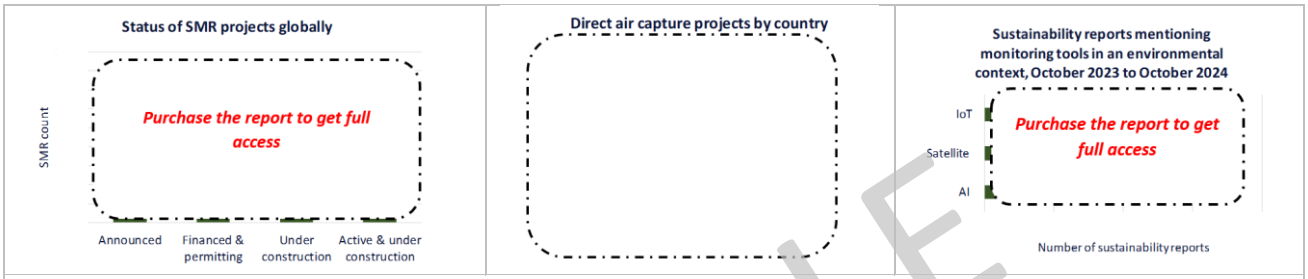
Climate tech encompasses several technologies that companies can use to reduce their greenhouse gas (GHG) emissions and reduce the impact of climate change on their business.

Energy demands will drive Big Tech to use nuclear power

Big Tech is building more data centers to meet the rising demand for AI and cloud. According to the International Energy Agency, data center electricity demand is projected to increase by up to XX% to XX terawatt hours by 2030. This would mean data centers consume more electricity than the whole of Germany. Companies like Microsoft and Alphabet aim to reduce their GHG emissions to net zero by 2030, necessitating operational expansion while reducing their carbon footprint. To meet these goals, tech firms are turning to nuclear power. Microsoft plans to reopen the Three Mile Island nuclear facility, while Amazon, Google, and data center companies Equinix and Standard Power have announced nuclear power supply deals with small modular reactor (SMR) providers. Only three SMRs are currently in operation globally, with XX in the pipeline. SMRs are prized for their portability, scalability, safety features, and lower initial costs.



Source: GlobalData. Note: IoT stands for Internet of Things.

Winners and losers

- **Winners**: Big Tech companies like Microsoft and Google that have secured early agreements for DAC and SMRs.
- **Losers**: Companies not exploring emerging Climate Tech or climate and emissions monitoring tools.

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Cloud Computing

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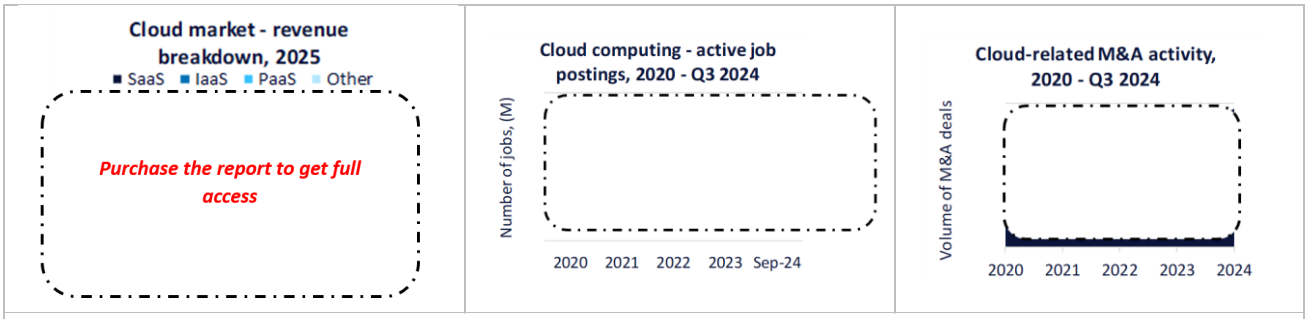
The cloud market will grow to nearly $XX trillion in 2025

According to GlobalData forecasts, the total value of the cloud computing market will grow by XX% from $XX billion in 2024 to $XX billion in 2025. Software as a service (SaaS) is expected to generate XX% of the total market revenue in 2025, while infrastructure as a service (IaaS) and platform as a service (PaaS) will each contribute XX%.



Source: GlobalData

Winners and losers

- **Winners**: Companies embedding AI in their cloud services; telecom infrastructure vendors enabling successful edge computing and network API integrations.
- **Losers**: Cloud vendors with limited AI offerings. Companies that are slow to migrate legacy applications to the cloud and create cloud-native apps.

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Critical Minerals

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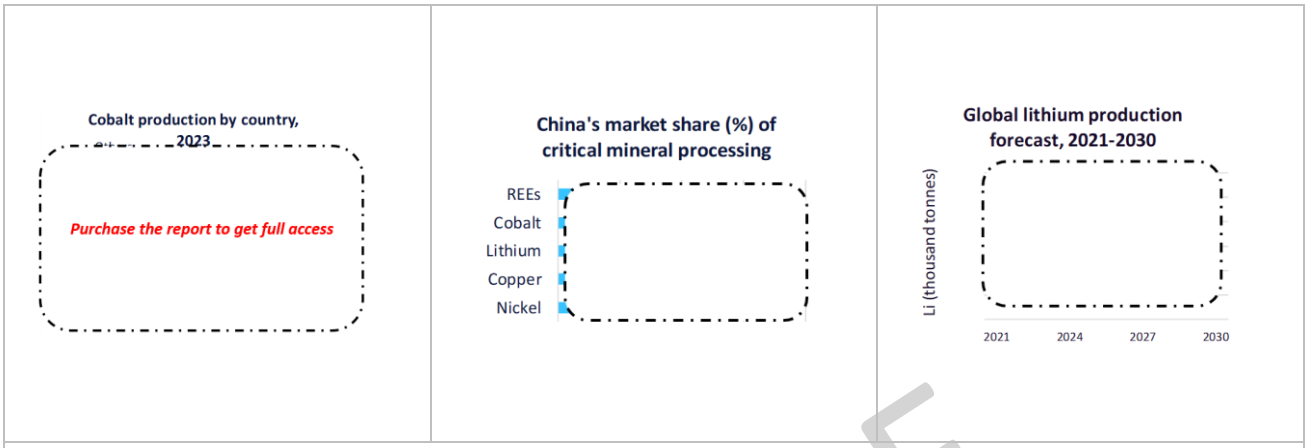
Net zero targets will put further pressure on critical mineral prices

Electric vehicles (EVs), solar panels, nuclear reactors, and wind farms require minerals that face monopolization, short supply, and rapid depletion. GlobalData categorizes lithium, copper, nickel, cobalt, and rare earth elements (REEs) as the most critical minerals. With over XX nations adopting net zero targets, demand for energy transition technologies and the critical minerals needed to create them has skyrocketed.



Source: GlobalData, IEA.

Winners and losers

- **Winners**: Renewable energy companies that can develop their own supply chain in the face of Chinese restrictions, Latin American mining companies like SQM and Albemarle.
- **Losers**: Mining companies reliant on Chinese processing and exports.

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Cryptocurrencies and Blockchain

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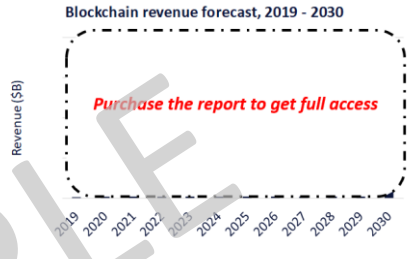
Cryptocurrencies are digital tokens representing a store of value that can be exchanged securely on a peer-to-peer network without a central authority. Blockchain is a distributed ledger of digitally recorded data in blocks, chained together with cryptographic signatures for secure sharing and access. GlobalData forecasts that the global blockchain software and services market will reach $XX billion in 2030, up from $XX billion in 2023.

The outlook for cryptocurrencies will remain positive in 2025

President-elect Donald Trump's pro-crypto stance signals a shift towards more favorable regulation and increased institutional involvement from the US. This could lead to broader adoption of digital assets. Cryptocurrencies unexpectedly became a popular topic during the election, appealing to a young and diverse demographic. The cryptocurrency market received a significant boost after Trump's victory. The launch in 2024 of exchange-traded funds (ETFs), such as BlackRock's iShares Bitcoin Trust (IBIT), has made investing in bitcoin easier and more lucrative. Trump's proposal to establish a strategic bitcoin reserve to address national debt risks could attract institutional investors, potentially driving crypto prices up.



Source: CoinMarketCap, GlobalData

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Winners and losers

- **Winners**: Major centralized exchanges like Binance, Coinbase, Kraken, and Crypto.com, pure-plays like Ripple and Circle, among others will benefit from a pro-regulatory environment. Financial firms moving into tokenization such as JP Morgan and Franklin Templeton.
- **Losers**: Companies that fail to embrace crypto and overlook security and regulatory considerations.

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Cybersecurity

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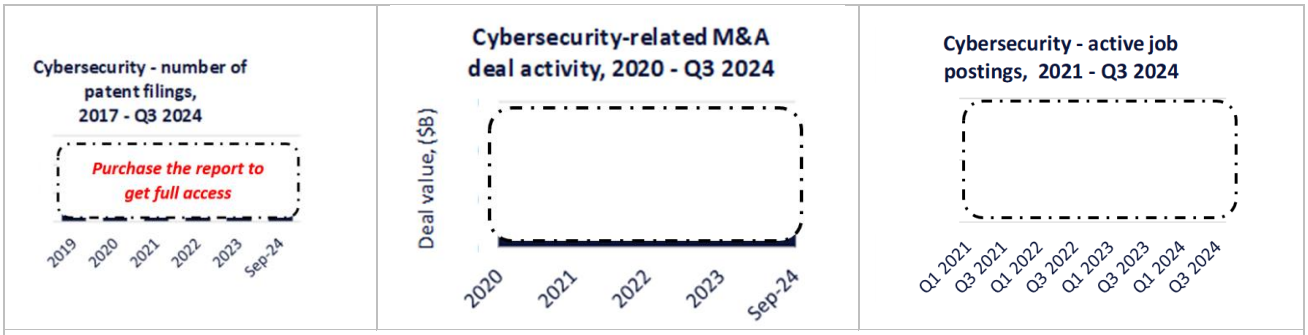
The cybersecurity market will be worth $XX billion in 2025

Cybersecurity is a highly disruptive theme that affects many different organizations and individuals. It is growing in demand: GlobalData expects that the cybersecurity market will be worth $XX billion in 2025, up XX% from $XX billion in 2024.



Source: GlobalData

Winners and losers

- **Winners:** Cybersecurity software vendors with strong AI skills, including Check Point Software and CrowdStrike, among others
- **Losers:** Organizations that leave employees vulnerable to AI-based social engineering attacks.

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Gaming

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The gaming software industry will be worth $XX billion in 2025

The video games industry is constantly evolving, influenced by themes like AI, augmented reality (AR), virtual reality (VR), esports, and cloud gaming. According to GlobalData forecasts, the gaming software market was worth just under $XX billion in 2023. It will be worth over $XX billion in 2025 and $XX billion by 2030.

Source: GlobalData

Winners and losers

- **Winners:** Leaders in PC gaming (Microsoft, Electronic Arts), among others
- **Losers**: Laggards in PC gaming (Sea and Embracer), among others

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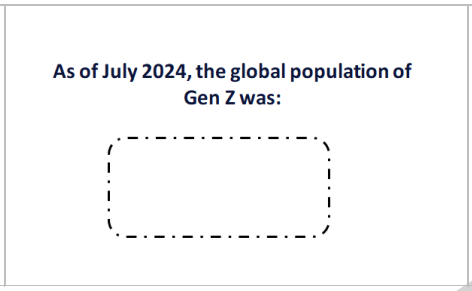
Generation Z

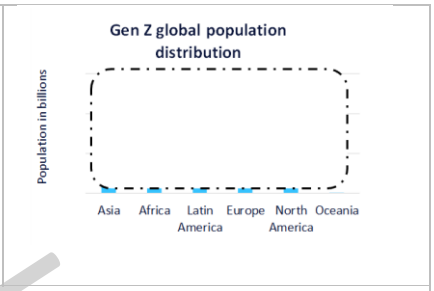
Back to contents

Generation Z consists of anyone born between 1997 and 2012.

Gen Z will put pressure on companies to offer more flexibility at work

By 2025, Gen Z will make up more than one-quarter of the global workforce, according to the World Economic Forum (WEF). Gen Z values work-life balance and flexible working models. According to McKinsey, Gen-Zers and millennials are 59% more likely to leave a job if hybrid options are unavailable. Gen Z increasingly opts for freelancing over traditional 9-to-5 roles, with 53% of Gen Z professionals freelancing in 2023, according to the Upwork Research Institute. In the same survey, 70% of Gen Z respondents stated they enjoyed the flexibility offered by freelancing. Companies must offer flexible working options to attract and retain Gen Z talent.





Source: GlobalData 2024 Q2 global consumer survey (June 2024, 3010 responses), UN World Population Prospects 2024

Winners and losers

- **Winners**: Companies that deliver instant and personalized experiences to Gen Z consumers.
- **Losers**: Companies that overlook Gen Z's unique consumer behavior.

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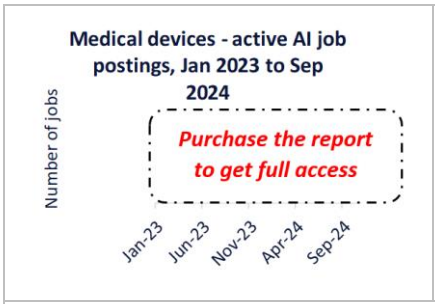
Healthtech

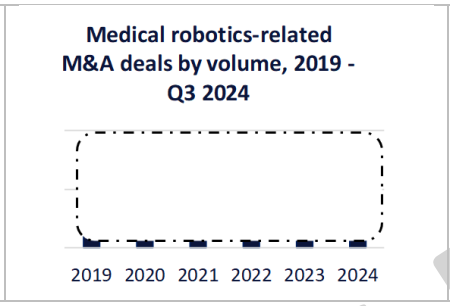
Back to contents

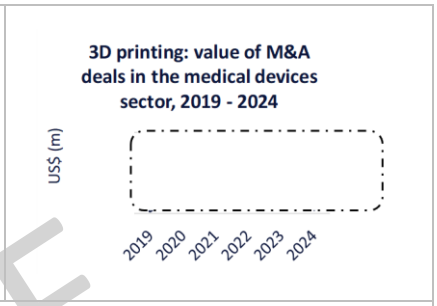
Several technologies will drive the future of healthcare, including AI, robotics, 3D printing, digital therapeutics, synthetic biology, virtual and augmented reality, nanotechnology, and blockchain. Below, we focus on the first three.

AI will enhance accuracy in medical imaging and diagnostics

AI holds great promise in various areas of medicine. It has the potential to significantly impact imaging and diagnostics. AI technologies like computer vision (CV) can assist radiologists by spotting abnormalities in scan images, enabling quicker and more accurate diagnoses. This technology is already being used by companies like GE Healthcare, which, in March 2024, launched ultrasound imaging software SonoSAMTrack, developed in collaboration with Nvidia. The global CV market will be worth $XX billion in 2030, up from $XX billion in 2023, representing a CAGR of XX% between 2023 and 2030, according to GlobalData forecasts.







Source: GlobalData

Winners and losers

- **Winners**: Companies investing in AI, medical robots, and 3D printing, like GE Healthcare and 3M, among others.
- **Losers**: Medical devices and healthcare companies that fail to invest in healthtech.

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Internet of Things

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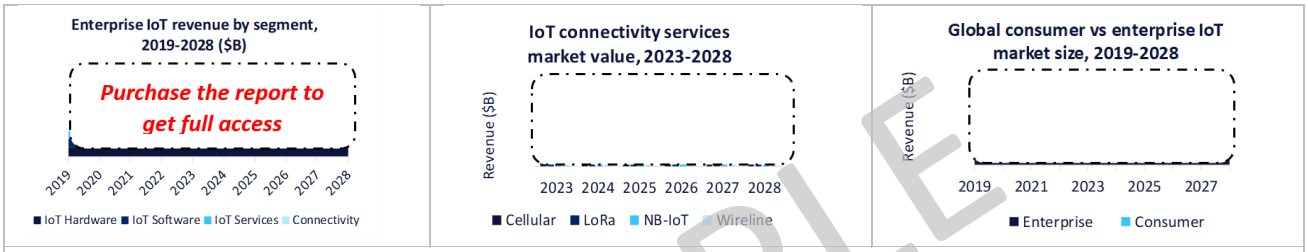
The Internet of Things, or IoT, describes the use of connected sensors and actuators to control and monitor the environment, the things that move within it, and the people that act within it. GlobalData forecasts that the global IoT consumer and enterprise market will reach $XX trillion in revenue by 2028.

Cybersecurity will be the biggest threat to widespread IoT adoption

IoT can generate vast amounts of data, but this data is constantly under threat from cyberattacks. It is unlikely that pervasive IoT will become a reality without establishing a global IoT security standard, and a lack of security controls leaves devices vulnerable to identity theft, industrial espionage, and ransomware attacks. In a 2021 breach affecting cloud-based video surveillance service Verkada, customers' information was leaked along with live feeds of over XX cameras located in sites such as factories, hospitals, schools, and prisons. Cybersecurity continues to be a threat; according to Check Point, in the first two months of 2023, there were, on average, almost XX cyberattacks targeting IoT devices per organization per week. Manufacturers of IoT devices must prioritize security. However, as the number of connected devices continues to rise, navigating the complex cybersecurity landscape becomes increasingly challenging. Regular software updates and encryption protocols are crucial to safeguarding IoT systems from potential threats.



Source: GlobalData. Note: For definitions of cellular, LoRa, NB-IoT, and wireline, see the Glossary section of this report.

Winners and losers

- **Winners**: Companies implementing AI into their IoT offerings, such as Alibaba and Alphabet, among others; IoT connectivity providers with strong investment in AI-enabled solutions.
- **Losers**: Companies that fail to invest in IoT security.

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Quantum Computing

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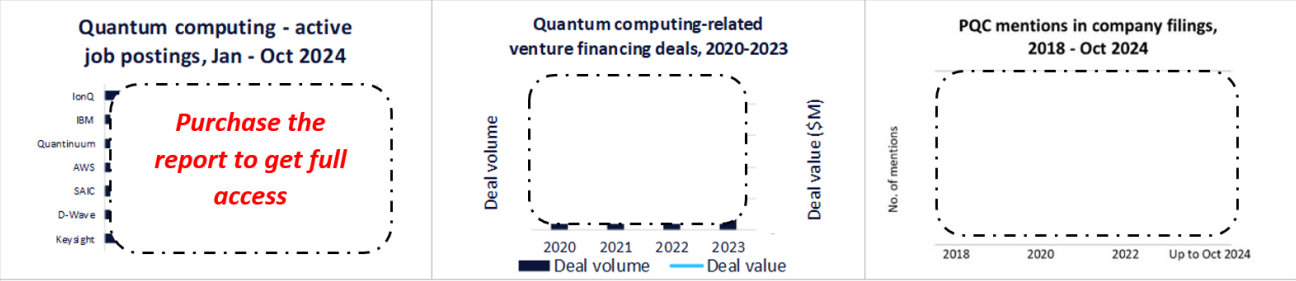
Quantum computers are machines that use the properties of quantum physics to store data and perform computations. Unlike classical computers that use bits, quantum computers use quantum bits, or qubits, for faster parallel processing, allowing them to solve complex problems rapidly. Progress in quantum hardware and algorithms could revolutionize industries like cryptography, materials science, and AI.



Source: GlobalData. Note: PQC stands for post-quantum cryptography.

Winners and losers

- **Winners:** Companies providing post-quantum cryptography, including QuSecure and Qrypt, and companies focusing on quantum error correction, including Xanadu, PsiQuantum, IBM, and Microsoft.
- **Losers**: Messaging services that ignore integrating PQC.

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Robotics

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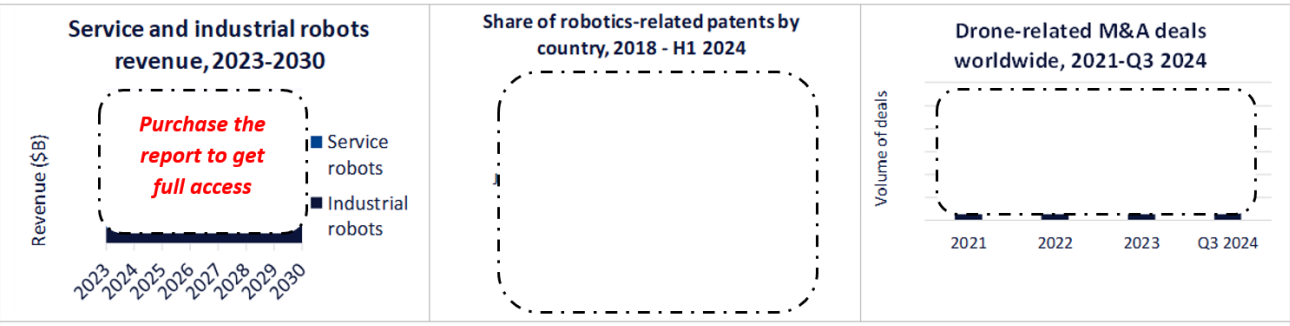
The robotics industry will be worth $XX billion by 2030

Robots are machines capable of carrying out a complex series of actions (typically programmed by a computer) automatically and repeatedly. Industrial robots are typically used in factories to automate parts of the manufacturing process, while service robots assist humans at work in non-industrial settings or the home. The robotics industry will grow from $XX billion in 2023 to $XX billion in 2030 at a CAGR of XX% between 2023 and 2030.



Source: GlobalData.

Winners and losers

- **Winners**: Companies incorporating AI into robotics such as ABB and DJI, among others.
- **Losers**: Robotics companies not investing in AI.

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Social Media

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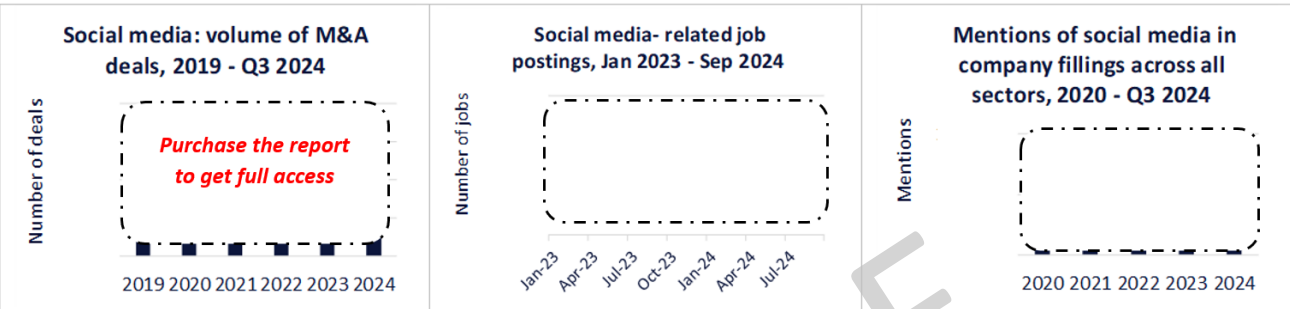
Social media giants will face increased content moderation challenges

Governments and regulators are at a stand-off with social media companies, including X (formerly Twitter) and Telegram, over the content published on their platforms. The August 2024 arrest of Telegram's CEO Pavel Durov in France on charges of failing to act against criminals using the app was followed days later by Elon Musk's X being blocked in Brazil after it had refused to ban several profiles deemed by the government to be spreading misinformation. The ban on X has since been lifted, and Durov has been released on bail, though the case is still under investigation. There is a growing demand for social media companies to implement robust content moderation systems to prevent illegal activities and harmful content. Governments may impose penalties or even consider bans if platforms fail to comply with these regulations, pushing companies to invest more in compliance and moderation technologies.



Source: GlobalData

Winners and losers

- **Winners**: Social media companies investing in compliance and content moderation technologies, adapting to regulatory demands.
- **Losers**: Social media companies that face regulatory scrutiny over insufficient content moderation, such as Telegram and X.

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The Future of Connectivity

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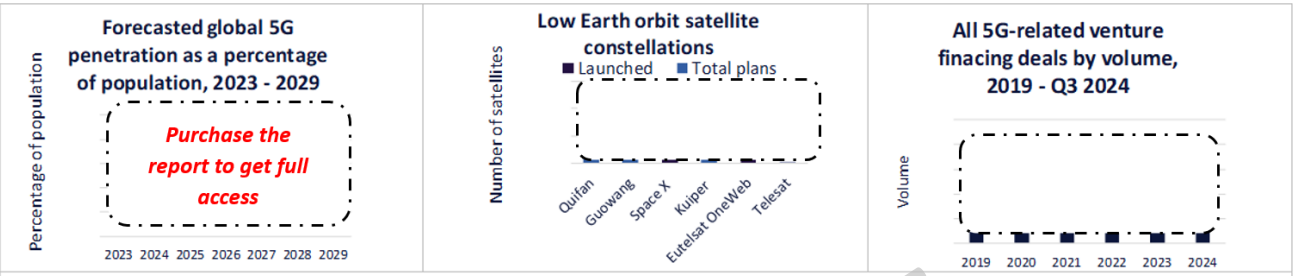
5G-A will launch commercially, advancing progression from 5G to 6G

5G Advanced (5G-A) is close to commercial launch after the completion of Release 18 by the 3GPP, the mobile industry standards body. With 5G-A, 5G should finally start living up to its promises. The release of the first commercial offerings, led by China, is expected during 2025, with a more large-scale deployment of 5G-A expected by operators in 2026. Potential use cases include augmented reality (AR) devices, autonomous vehicles (AVs), and contextual translation devices. 5G-A is expected to play a crucial role in bridging the gap from 5G to 6G, with 5G-A technology and future innovations acting as a precursor to 6G. For example, 6G will piggyback on 5G-A infrastructure. 5G-A will likely coexist with 6G for much of the 2030s.



Source: GlobalData, company data

Winners and losers

- **Winners**: Telecom equipment manufacturers that successfully implement AI into their systems. Telcos that have a migration strategy from 3G to 4G and 5G. Telcos implementing edge infrastructure.
- **Losers**: Telecom equipment manufacturers that cannot integrate AI efficiently into their products. Telcos without a migration strategy from 3G to 4G and 5G. Telcos that do not have edge infrastructure.

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The Future of Mobility

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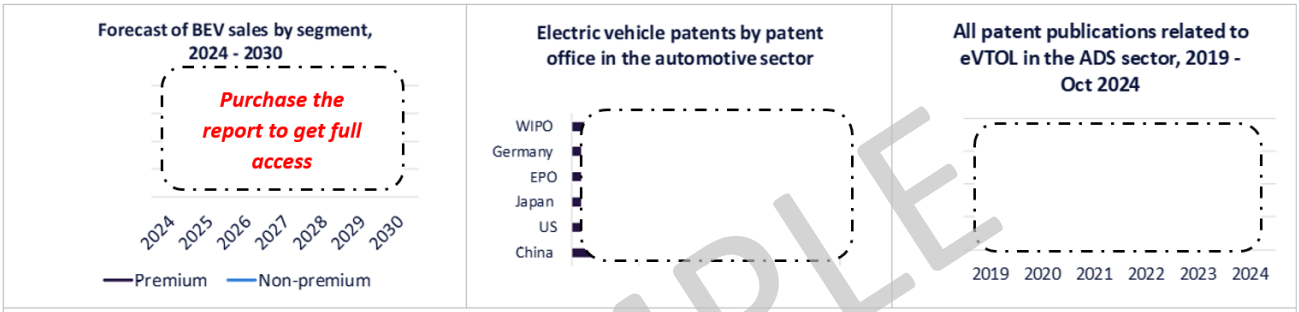
The future of mobility refers to the transformative shifts in how people and goods travel, driven by technological progress and evolving societal needs. It encompasses several key trends, including the rise of autonomous vehicles (AVs) and electric vehicles (EVs), shared mobility, electrification, and connectivity.

European carmakers will launch affordable EVs in 2025

In 2025, European automakers like Citroën, Fiat, and Renault will launch more budget-friendly electric vehicles (EVs)—priced around EUR20,000 ($XX)—boosting EV demand in Europe following a recent decline in adoption. In comparison, the average price of an EV in Europe in 2023 was EURXX (or $XX) according to the European Commission. So far, the lack of affordable EV options has hindered consumer uptake, causing a plateau in adoption following early demand from affluent, environmentally conscious buyers. According to GlobalData forecasts, the number of non-premium battery electric vehicle (BEV) models available in Europe will increase from XX in 2024 to XX in 2025, before hitting XX in 2026. With their established dealership networks and brand recognition, European brands will have an advantage over Chinese competitors in the near term, even those localizing production.



Source: GlobalData. Note: WIPO stands for World Intellectual Property Organization, while EPO stands for European Patent Office.

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Winners and losers

- **Winners**: Leading Chinese EV makers like BYD and Geely developing Level 4 autonomous driving technology. European carmakers that launch non-premium EVs, like Citroën, Fiat, and Renault.
- **Losers:** Carmakers that fail to launch low-budget EVs will suffer in Europe.

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- The report identifies and analyses 25 themes that will impact every industry in 2025.
- Each theme has been classified into three groups: technology, macroeconomic, and ESG.
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The Future of Work

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The future of work will reshape factories and offices, encouraging greater collaboration between humans and technology and empowering workers with digital skills. In the background, technology is bringing about profound political, economic, and social change, raising the debate around how themes like AI could change how we work. Our future of work framework encompasses five segments: visualization, automation, interpretation, collaboration, and connectivity.

Generative AI will be embedded in most workplaces worldwide

Generative AI (GenAI) will remain the hottest enterprise technology trend and drive the next stage of business process automation. GenAI enterprise adoption will increase as competition between enterprise technology players leads to advances in the quality and capabilities of GenAI platforms. Many Big Tech companies leading in GenAI, such as Alphabet, Meta, and Microsoft, are partnering with research organizations and start-ups like OpenAI, Anthropic, Mistral AI, and Hugging Face to access their talent and product licenses. GlobalData forecasts that the GenAI market will grow at a CAGR of XX% between 2023 and 2028, reaching a market value of $XX billion by 2028.

Source: GlobalData, GlobalData ICT Customer Insight Survey 2024 (April 2024, 2,782 respondents).

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Winners and losers

- **Winners**: Companies developing and adopting the most advanced technologies in visualization, connectivity, automation, and interpretation, like Amazon and Apple, among others.
- **Losers**: Companies falling behind on digital upskilling and slow in adjusting to a hybrid work model, particularly those that fail to invest in GenAI platforms and collaborative tools and do not offer sufficient employee training.

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The Space Economy

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The space economy encompasses a range of activities, including satellite data applications and space exploration. Market estimates suggest the space economy will be worth between $XX billion and $XX trillion in 2030. Investments in this sector are increasing due to technological progress and geopolitical rivalry, notably between the US and China. The industry is seeing more government and private attention, with space launches increasing yearly.

Source: GlobalData

Winners and losers

- **Winners:** Companies with a significant market share in the space economy, including SpaceX and Blue Origin, among others
- **Losers**: Boeing. The company has been criticized for leaving astronauts stranded in space, and there is talk of it selling its space business.

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Video Streaming

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Video streaming services will become more like traditional TV

Video streaming allows video content to be distributed over the internet to a TV or connected device. According to GlobalData forecasts, the global market for subscription video on demand (SVoD), a video streaming service where viewers pay a monthly fee to access a library of content, will be valued at $XX billion in 2025, up from $XX billion in 2024. Streaming services are evolving to include TV-like features such as advertising and live programming, blurring the line between TV and streaming. However, they still offer the unique benefits of on-demand access and personalized viewing experiences. There will likely be a continued blending of these models, creating a hybrid entertainment landscape and eroding traditional TV's market share.

Source: GlobalData. *2024 numbers are based on company expectations, news reports, and GlobalData estimates

Winners and losers

- **Winners**: Leading SVoD players (Netflix and Disney) among others
- **Losers**: Traditional TV networks and streaming services that do not invest sufficiently in content.

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Glossary

Term	Definition
5G	The fifth generation of cellular technology standards, based on IMT2020 standards, under development by the 3GPP. The term '5G' does not explicitly refer to any particular technology or standard and is, therefore, a loose term that can be used and interpreted in multiple different ways, typically for marketing purposes.
5G-Advanced (5G-A)	The next intermediate update to the 5G standard, 5G-A represents a significant boost in performance and latency. 5G-A starts with 3GPP Release 18 and will run through Release 20. Some of the key features in 5G-A are non-terrestrial 5G to satellite and 5G NTN IoT, security updates, AI features, and high-precision location management for devices.
5G Non-Terrestrial Networks (NTN)	5G Non-Terrestrial Networks (NTN) are wireless communication systems that use satellites and other airborne vehicles to extend the reach of 5G networks
5G Reduced Capability (RedCap)	A 5G standard specifically designed for Internet of Things (IoT) applications that demand lower complexity, reduced cost, and decreased power consumption.
Advertising video on demand (AVoD)	Video-on-demand services that use an advertising-based revenue model. Typically employed by traditional channels on their online catch-up services.
AI chips	Refers to chips that are designed to perform AI tasks more efficiently, thereby reducing the time taken to, for example, process the large data sets associated with machine learning. They are often referred to as AI accelerators and come in a variety of forms, including graphics processing units (GPUs), field programmable gate arrays (FPGAs), and application-specific integrated circuits (ASICs).
Antitrust	Legislation preventing or controlling trusts or other monopolies, and consequently promoting fair competition in business.
Application programming interface (API)	A set of defined methods of communication between programs so that information can be exchanged without the need to access the core of either program.
Artificial intelligence (AI)	Refers to software-based systems that use data inputs to make decisions on their own.
Artificial Intelligence of Things (AIoT)	The convergence between artificial intelligence (AI) and the Internet of Things (IoT). AIoT involves embedding AI technology into IoT components and combining data collected by sensors and actuators with the analytical capabilities of AI.
Augmented reality (AR)	Technology that allows the user to see the real world overlaid with a layer of digital content. This digital layer can include sensor-based data, sound, video, graphics, or other datasets.
Automation	A technique that enables processes, both digital and physical, to run themselves, with minimal human intervention.
Autonomous vehicle (AV)	Any vehicle that can drive itself without human intervention. There are five autonomous driving levels, of which the highest (Level 5) describes a vehicle that is fully autonomous under any conditions. This level is unlikely to be reached in the next 20 years.
Battery	A container consisting of one or more electrochemical cells in which chemical energy is converted into electricity. Batteries are used as a source of power.

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Term	Definition
Battery electric vehicle (BEV)	A fully electric vehicle that is only powered by an electric motor and does not have an internal combustion engine (ICE) at all. The Tesla Model 3 is an example of a BEV.
Beyond visual line of sight (BVLOS)	Refers to the concept that a drone may fly beyond the visual line of sight of the operator. This may impact the ability of the operator to safely handle the drone and is an inflection point for many regulators.
Biotechnology	The exploitation of biological processes for the development of technologies and products for a specific use.
Blockchain	A type of distributed ledger, comprising unchangeable, digitally recorded data in packages called blocks. Each block is then "chained" to the next block, using a cryptographic signature. This allows blockchains to be used like a ledger, which can be shared and accessed by anyone with the appropriate permissions.
Cable TV	A TV service delivered through a wired cable connection. Cable TV is typically provided to subscribers through coaxial or fiber-optic cables connected directly to a set-top box or a TV set.
Carbon capture and storage (CCS)	A technology that captures carbon and waste at the source and safely deposits it elsewhere to prevent it from entering the atmosphere. The process can capture up to 90% of the CO_2 emissions produced from fossil fuels and industrial activities.
Cellular connectivity	SIM-based machine-to-machine (M2M) connectivity, using licensed spectrum. Includes 2G, 3G, LTE, and 5G.
Cloud computing	Computing delivered as an online service. It encompasses the provision of IT infrastructure, operating software, middleware, and applications hosted within a data center and accessed by the end-user via the internet.
Cloud gaming	Refers to a game that resides on a server, rather than on the gamer's computer or device. A video of gameplay is streamed to the users, with their inputs sent back to the cloud gaming server via the network.
Collaboration tools	Software tools that aim to boost productivity by helping teams work together more efficiently. They incorporate services like instant messaging, file sharing, and video conferencing.
Communication platform as a service (CPaaS)	Cloud-based platforms that enable the integration of real-time communications into business applications through application programming interfaces (APIs). CPaaS platforms support a range of communications, including SMS, video, email, chat apps, and voice, to deliver an omnichannel customer experience.
Co-streaming	Refers to the ability of two or more streamers to stream an esports event on multiple streaming channels simultaneously.
Computer vision	A key AI technology, which includes all technology that attempts to capture and interpret images or videos in a meaningful or useful way. There are four main categories of computer vision: image recognition, object recognition, video recognition, and machine vision.
Critical minerals	Today's five key critical minerals are lithium, cobalt, copper, nickel, and rare earth elements. These minerals are considered critical because resources are either in short supply, monopolized by individual regions, or at risk of significant supply chain disruption. Critical minerals are key to the energy transition.

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Term	Definition
Cryptocurrency	An electronic form of currency that, instead of being represented by a physical coin or banknote, takes the form of a secure digital token. The token represents a store of value that can be securely exchanged on a peer-to-peer basis over a network without needing to use a central processing authority like a bank.
Cyberattack	Refers to attempts to steal, expose, alter, disable, or destroy information through unauthorized access to computer systems.
Cybersecurity	The practice of defending computers, servers, mobile devices, electronic systems, networks, and data from malicious attacks.
Digital twins	Software representations of assets, processes, people, objects, and places that are used to understand, predict, and optimize performance to achieve improved business outcomes. Digital twins typically consist of three components: a data model, a set of analytics or algorithms, and knowledge.
Drone	An unmanned aerial vehicle (UAV) that can be remotely controlled or fly autonomously through software-controlled flight plans in its embedded systems, working in conjunction with onboard sensors and GPS.
Electric vehicle (EV)	A vehicle that uses one or more electric motors for propulsion.
Embedded subscriber identity module (eSIM)	A SIM card that cannot be removed from a device. eSIMs can be provisioned remotely, so end-users can switch mobile operators without the need to physically swap the SIM card used by their device.
Encryption	A method for scrambling a message, file, or other data and turning it into a secret code. The code can only be read using a "key" or other piece of information (such as a long string of numbers), usually created with an algorithm.
Esports	Organized multiplayer video game competitions, typically involving professional players.
Free ad-supported TV (FAST)	A type of video streaming service that does not require a paid subscription because it is funded entirely by advertisements.
Fuel cell	A device that generates power through an electrochemical process, much like a battery. While batteries have a limited life, fuel cells can provide unlimited power without any downtime for recharging.
Future of work	Refers to the changes impacting employment resulting from the increased use of technology.
Generation Z	A demographic cohort that consists of anyone born between 1997 and 2012.
Generative AI	Self-learning algorithms that use existing data, such as text, audio, or images, to produce realistic new content.
Geopolitics	The study of the effects of geography on politics and international relations. It covers the way a country's size, politics, and geographical position influences its relationships with other countries.
Governance	Governance assesses how a company's internal controls are used to inform business decisions, comply with the law, and meet moral obligations to external stakeholders.

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Term	Definition
Graphics processing unit (GPU)	A programmable logic chip specialized for display functions. Modern GPUs can manipulate computer graphics and provide image processing very efficiently. They are also able to take large data sets and perform the same operation repeatedly and at high speed, which has made them fundamental to the development of AI technologies.
Greenhouse gases (GHGs)	Gases that trap and hold heat in the atmosphere, contributing to the rise in Earth's average temperature. The main GHGs are carbon dioxide (CO_2), methane (CH_4), nitrous oxide (N_2O), and fluorinated gases.
Healthtech	The application of organized knowledge and skills in the form of devices, medicines, vaccines, procedures, and systems developed to solve a health problem and improve quality of life.
Humanoid robot	A multi-purpose robot that resembles the human body, having a torso, a head, two arms, and two legs. It can perform tasks that mimic human actions, making them suitable for complex interactions in human-centric environments.
Industrial automation	The use of control systems, such as computers or robots, and information technologies for handling different processes and machinery in an industry to replace a human being.
Industrial robot	A robot that is typically used in factories to automate parts of the manufacturing process.
Internet of Things (IoT)	An umbrella term used to describe the use of connected sensors and actuators to control and monitor the environment, the things that move within it, and the people that act within it.
Large language model (LLM)	A type of AI model that can perform various natural language processing tasks, including generating and classifying text, answering questions, and translating languages. A language model is considered large if it has over 100 billion internal parameters or internal nodes, which it updates as it learns. Examples of LLMs are OpenAI's GPT-4 and Google's Gemini.
Light detection and ranging (LiDAR)	A remote sensing method that uses light in the form of a pulsed laser to measure ranges (variable distances) to the Earth. These light pulses—combined with other data recorded by the airborne system — generate precise, three-dimensional information about the shape of the Earth and its surface characteristics.
Linear TV programming	The broadcasting of scheduled TV programming. This conventionally takes place on traditional platforms: cable TV, satellite TV, and terrestrial TV.
Liquified natural gas (LNG)	A clear, colorless, and non-toxic liquid that forms when natural gas cools to 162°C (-260°F).
Lithium	The earth’s lightest solid element with double the energy density of its nearest competitor.
Lithium-ion battery	A type of rechargeable battery, commonly used in laptops, smartphones, electric vehicles (EVs), and energy storage packs.
LoRa	From Long Range. A digital wireless communication technology with very long-range transmission of more than 10km.
Low Earth orbit (LEO)	Describes objects that are orbiting the Earth at a height of 2,000km or less.

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Term	Definition
Machine learning	An application of AI that gives computer systems the ability to learn and improve from data without being explicitly programmed.
Medical robot	A robot used in the medical sciences. This category of robot incorporates surgical robots, which either allow surgical operations to be carried out with greater precision than an unaided human surgeon or allow for remote surgery (where a human surgeon is not physically present with the patient) to be performed.
Mobile gaming	A game played on your mobile phone, as opposed to a console or PC.
Narrowband IoT (NB-IoT)	A standards-based low power wide area network (LPWAN) technology developed by 3GPP to enable a wide range of cellular devices and services. NB-IoT focuses specifically on indoor coverage, low cost, long battery life, and high connection density.
Natural language processing (NLP)	A field of AI concerned with enabling computers to analyze, understand, and derive meaning from human language (both text and speech).
Net zero	Refers to the balance between the amount of greenhouse gases produced and the amount removed from the atmosphere.
Noisy, intermediate-scale quantum (NISQ) devices	The current best-performing quantum computers. The term 'noisy' refers to the interference that disrupts the calculation, leading to errors.
Patent	An exclusive right granted for an invention, which is a product or a process that provides, in general, a new way of doing something or offers a new technical solution to a problem.
Patent office	The public body which receives and grants patents in each country.
Platforms	Any hardware or software used to host an application or service.
Post-quantum cryptography (PQC)	A new generation of cryptographic algorithms that are designed to be secure against attacks from both quantum and classical computers.
Quantum as a service (QaaS)	A cloud-based service providing customers access to quantum hardware over the internet.
Quantum bit (qubit)	A unit of quantum information that operates in a two-state quantum-mechanical system, unlike a bit.
Quantum computing	An area of study that aims to develop computer technology based on the principles of quantum theory, which attempts to explain the nature and behavior of matter and energy on both atomic and subatomic levels.
Quantum error correction (QEC)	A set of techniques used to protect quantum information from errors due to decoherence and other quantum noise.
Radio access network (RAN)	A technology that connects individual devices to other parts of a network through radio connections. RAN functionality is typically provided by a silicon chip situated in both the core network and the end-user equipment.
Ransomware	A type of malware that prevents access to the target's computer system or data until a ransom is paid to the attacker. Often uses encryption to lock up files or IT systems, holding them hostage until money is paid for a decryption key.

SAMPLE

Term	Definition
Ransomware as a service	A business model where cybercriminals provide ransomware tools and infrastructure to other individuals or groups—known as affiliates—in exchange for a share of the proceeds from successful ransomware attacks.
Rare earth elements (REEs)	A group of 17 rare metals used in many core strategic tech products.
Recycling	The process of changing waste (including unused products or goods) into a new material, product, or good.
Regulation	A rule or directive made and maintained by an authority.
Remote sensing	The science of obtaining information about objects or areas from a distance, typically from aircraft or satellites.
Remote working	Refers to employees working from home rather than commuting to their workplace.
Renewable energy	Energy generated from naturally occurring and replenished renewable sources. Common types are wind, solar, geothermal, and tidal.
Robot	A machine capable of carrying out a complex series of actions (typically programmed by a computer) automatically and repeatedly.
Robotic exoskeletons	Wearable mobile machines that allow for limb movement with increased strength and endurance, The main use cases are in healthcare, defense, and manufacturing.
Robotics	The branch of technology which deals with the design, construction, operation, and application of robots.
Synthetic Aperture Radar (SAR)	A technique that uses a moving radar system to create high-resolution images of the Earth's surface. SAR works by transmitting energy pulses and recording the amount of energy reflected from the Earth.
Scope 1 emissions	Refers to all other indirect emissions in a company's value chain, such as tailpipe emissions of vehicles sold.
Scope 2 emissions	Refers to indirect emissions from the generation of purchased electricity, steam, and heating and cooling consumed by the company.
Scope 3 emissions	Refers to all other indirect emissions in a company's value chain, such as tailpipe emissions of vehicles sold.
Service robot	A robot that assists humans, either at work or in the home
Sensor	A device that detects or measures a physical property and then responds accordingly.
Small language model (SLM)	A generative AI technology similar to a large language model (LLM) but with a significantly reduced size. SLMS are developed for specific tasks and built with selected data sources
Social media	Computer-mediated technologies that facilitate the creation and sharing of information, ideas, interests, and other forms of expression via virtual communities and networks.
Sodium-ion battery	A type of rechargeable battery that uses sodium ions to transport charge. Sodium-ion batteries are a low-cost alternative to lithium-ion batteries for electric vehicles.

SAMPLE

Term	Definition
Software as a service (SaaS)	SaaS is IaaS plus PaaS and the application that runs on them. The software is usually invoiced on a per-user subscription basis or on a transactional basis. SaaS allows users to access applications over the internet that are managed by a third-party vendor without having to download the software locally (e.g., Salesforce).
Splinternet	The fragmentation of the internet into separate spheres supporting competing visions of how technology standards and regulation should be implemented and geopolitical conflicts around internet architecture.
Streaming	A distribution process that allows for a multimedia file to be accessed without being downloaded first.
Subscription video on demand (SVoD)	Video-on-demand services that use a subscription business model, with subscribers being charged a daily, weekly, monthly, or yearly fee to access unlimited content.
Supply chain	Comprises the activities and processes that organizations perform to manufacture and deliver goods and services to consumers.
Supply chain bottleneck	Constraints that disrupt the flow of goods or services, resulting in delays and inefficiencies.
Supply chain disruption	An event that compromises the production, distribution, or sale of goods or services.
Sustainability	An approach that focuses on environmental, social, and governance (ESG) factors to ensure the long-term growth of a company or country.
Token	Cryptocurrencies created on existing blockchains, often to facilitate specific functions within a decentralized application.
Tokenization	The conversion of asset rights (specifically, units of asset ownership) into digital tokens.
Triple-A	A classification term used for video games with the highest development budgets and levels of promotion
Vertical take-off and landing (VTOL)	A vertical take-off and landing aircraft is an aircraft that can hover, take off, and land vertically, without the need for a runway.
Video streaming	Video content that is streamed over the internet to a television or connected device.
Virtual reality (VR)	Refers to technology that aims to immerse the user in an entirely artificial world, which has the illusion of reality. It uses special equipment such as headsets or gloves fitted with sensors to simulate a user's physical presence in a 3D environment.
WebAR	Allows users to experience AR content through web browsers, rather than using a standalone app or marker (a visual cue that triggers the display of virtual information).
Wireline	The transmission of information over a physical filament.

Source: GlobalData

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Many of the datasets in this report are sourced from GlobalData's proprietary databases. Here are the primary databases we used to source our data.

GlobalData database
Company Filings Analytics
Deals
Job Analytics
Macroeconomic Data
Patent Analytics
Social Media Analytics
Surveys
Source: GlobalData

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Further Reading

GlobalData reports

Publication date	Report title
November 2024	Strategic Intelligence: Net Zero Strategies in the Mining Sector
November 2024	Strategic Intelligence: Net Zero Strategies in Agriculture
November 2024	Strategic Intelligence: Net Zero Strategies in the Power Sector
November 2024	Strategic Intelligence: AI in Drug Discovery
November 2024	Strategic Intelligence: US Elections 2024 Executive Briefing
November 2024	Strategic Intelligence: Climate Tech
November 2024	Strategic Intelligence: Artificial Intelligence in Sport
November 2024	Strategic Intelligence: Digital Identity
October 2024	Strategic Intelligence: eVTOL in Aerospace and Defense
October 2024	Strategic Intelligence: Digital Transformation and Emerging Technologies in the Healthcare Industry
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October 2024	Strategic Intelligence: Critical Minerals
October 2024	Strategic Intelligence: Esports
October 2024	Strategic Intelligence: ESG Sentiment Polls Q3 2024
October 2024	Strategic Intelligence: Tech Sentiment Polls Q3 2024
October 2024	China Watch: US election – Getting ready for (trade) war
October 2024	Strategic Intelligence: Virtual Reality
October 2024	Strategic Intelligence: Geopolitics Executive Briefing (Third Edition)
October 2024	Strategic Intelligence: Artificial Intelligence Executive Briefing (Fourth Edition)
October 2024	Strategic Intelligence: The Future of Work
October 2024	Strategic Intelligence: Artificial Intelligence in Retail and Apparel
October 2024	Strategic Intelligence: Geopolitics Executive Briefing (Third Edition)
October 2024	Thematic Intelligence: Artificial Intelligence in Consumer
October 2024	Strategic Intelligence: Artificial Intelligence in Automotive

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Publication date	Report title
October 2024	Strategic Intelligence: Deep Dive into Humanoid Robots
October 2024	Strategic Intelligence: India Tech
September 2024	Thematic Intelligence: The Space Economy
September 2024	Thematic Intelligence: AI Chips
September 2024	Thematic Intelligence: Semiconductor Industry Primer
September 2024	Thematic Intelligence: Artificial Intelligence in Healthcare
September 2024	Thematic Intelligence: Artificial Intelligence in Film and TV
September 2024	Thematic Intelligence: Artificial Intelligence in Travel & Tourism
September 2024	Thematic Intelligence: Artificial Intelligence in Agriculture
September 2024	Strategic Intelligence: Artificial Intelligence in Healthcare
September 2024	Thematic Intelligence: Artificial Intelligence in Film and TV
September 2024	Thematic Intelligence: Artificial Intelligence in Mining
September 2024	Thematic Intelligence: Artificial Intelligence in Energy
September 2024	Thematic Intelligence: Robotics
September 2024	Thematic Intelligence: Intelligent Automation
September 2024	Thematic Intelligence: Video Games
August 2024	TrendSights Analysis 2024: Informed Shopping
August 2024	Thematic Intelligence: The Future of Industrials
August 2024	Thematic Intelligence: The Future of Leisure
August 2024	Thematic Intelligence: The Future of Financial Services
August 2024	Thematic Intelligence: Deep Dive into Ransomware
August 2024	Thematic Intelligence: Deep Dive into the Environmental Impact of Data Centers
August 2024	Thematic Intelligence: The Future of Healthcare
August 2024	Thematic Intelligence: Adtech
August 2024	Thematic Intelligence: Communications Platform-as-a-Service (CPaaS): Competitive Landscape Assessment
July 2024	Thematic Intelligence: The Future of Consumer

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Publication date	Report title
July 2024	Outlook for the Nuclear Power Industry – Small Modular Reactors (SMRs)
July 2024	Thematic Intelligence: ESG Framework (2024 Edition)
June 2024	Thematic Intelligence: Artificial Intelligence
June 2024	Thematic Intelligence: Geopolitics Executive Briefing (Second Edition)
June 2024	Thematic Intelligence: The State of the Biopharmaceutical Industry
May 2024	Thematic Intelligence: High-Performance Computing
May 2024	Thematic Intelligence: GlobalData's AI Governance Framework
May 2024	Thematic Intelligence: Deep Dive into the 2024 US Elections
May 2024	Thematic Intelligence: Next-Generation Chips
May 2024	Thematic Intelligence: Cloud Gaming
May 2024	Thematic Research: Splinternet
April 2024	Thematic Intelligence: Cybersecurity
April 2024	Thematic Intelligence: Artificial Intelligence – Executive Briefing (Third Edition)
April 2024	Thematic Intelligence: Misinformation
March 2024	Thematic Intelligence: Geopolitics in Tech, Media, Telecom
March 2024	Thematic Intelligence: Digital Twins
March 2024	Thematic Intelligence: Mobile Gaming
February 2024	Thematic Intelligence: Blockchain
February 2024	Thematic Intelligence: Cloud Computing
February 2024	Thematic Intelligence: Frictionless Commerce
February 2024	Thematic Intelligence: Quantum Computing
February 2024	Thematic Intelligence: Augmented Reality
December 2023	Thematic Intelligence: Carbon Offsets
December 2023	Thematic Intelligence: Autonomous Vehicles
November 2023	Thematic Intelligence: Internet of Things
November 2023	Thematic Intelligence: Batteries
November 2023	Thematic Intelligence: Social Media
October 2023	Thematic Intelligence: The Metaverse

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Publication date	Report title
October 2023	Thematic Intelligence: Artificial Intelligence – Executive Briefing (Second Edition)
October 2023	Thematic Intelligence: Space Systems in Aerospace and Defense
September 2023	Thematic Intelligence: Generation Z in Tech, Media, & Telecom
September 2023	Thematic Intelligence: Wearable Tech
August 2023	Thematic Intelligence: Tech Regulation
August 2023	Thematic Intelligence: Space Sustainability
July 2023	Thematic Intelligence: Video Streaming
June 2023	Thematic Intelligence: ESG 2.0
June 2023	Thematic Intelligence: Cryptocurrencies
June 2023	Thematic Intelligence: Artificial Intelligence—Executive Briefing
March 2023	Thematic Intelligence: 3D Printing
January 2023	Thematic Intelligence: Electric Vehicles
December 2022	Thematic Intelligence: Demographics
August 2022	Thematic Intelligence: Automated Home
August 2022	Thematic Intelligence: Drones
July 2022	Thematic Intelligence: China Tech
March 2022	Thematic Research: Smart Cities
Source: GlobalData	

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Our Thematic Research Methodology

Companies that invest in the right themes become success stories. Those that miss the important themes in their industry end up as failures.

Viewing the world's data by themes makes it easier to make important decisions

We define a theme as any issue that keeps a senior executive awake at night. GlobalData's thematic ecosystem is a single, integrated global research platform that provides an easy-to-use framework for tracking all themes across all companies in all sectors. It has a proven track record of identifying critical themes early, enabling companies to make the right investments ahead of the competition and secure that all-important competitive advantage.

Traditional research does a poor job of picking winners and losers

The difficulty in picking tomorrow's winners and losers in any industry arises from the sheer number of technology cycles—and other themes—that are in full swing right now. Companies are impacted by multiple themes that frequently conflict with one another. What is needed is an effective methodology that reflects, understands, and reconciles these conflicts.

That is why we developed our thematic engine

At GlobalData, we have developed a unique thematic methodology for ranking all major companies in all major sectors based on their relative strength in the big themes that are impacting their industries.

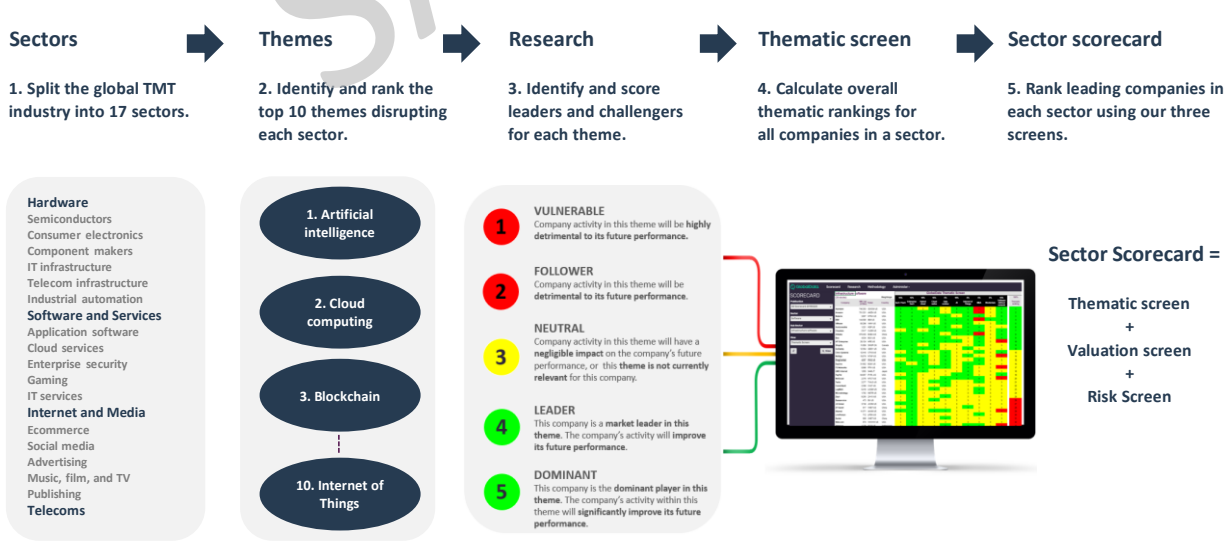
Our thematic engine tags over 180 million data items across six alternative data sets—patents, jobs, deals, filings, social media, and news—to themes. The vast datasets within our thematic engine help our analysts to produce sector scorecards that identify the companies best placed to succeed in a future filled with multiple disruptive threats.

How do we create our sector scorecards?

First, we split each industry into sectors because a different set of themes drives each sector. Taking the TMT (technology, media, and telecom) industry as an example, we split this industry into the sectors shown in the graphic below.

Our five-step approach for generating a sector scorecard

Here we use tech, media, and telecom as an example sector for illustration purposes



Source: GlobalData

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Second, we identify and rank the top 10 themes for each sector (these can be technology themes, macroeconomic themes, or industry-specific themes). Third, we publish in-depth research on specific themes, identifying the winners and losers within each theme. The problem is that companies are exposed to multiple investment themes, and specific themes' relative importance can fluctuate. So, our fourth step is to create a thematic screen for each sector to calculate overall thematic leadership rankings after taking account of all themes impacting that sector. Finally, to give a crystal-clear picture, we combine this thematic screen with our valuation and risk screens to generate a sector scorecard used to help assess overall winners and losers.

What is in our sector scorecards?

Our sector scorecards help us determine which companies are best positioned for a future filled with disruptive threats. Each sector scorecard has three screens:

- **The thematic screen** tells us who are the overall leaders in the 10 themes that matter most, based on our thematic engine.
- **The valuation screen** tells us whether publicly listed players appear cheap or expensive relative to their peers based on consensus forecasts from investment analysts.
- **The risk screen** tells us who the riskiest players in each industry are, based on our assessment of four risk categories: operational risk, financial risk, industry risk, and country risk.

How do we score companies in our thematic screen?

Our thematic screen ranks companies within a sector based on overall leadership in the 10 themes that matter most to their industry, generating a leading indicator of future earnings growth.

Thematic scores predict the future, not the past. Our thematic scores are based on our analysts' assessment of their competitive position in relation to a theme, on a scale of 1 to 5:

1	**Vulnerable**	The company's activity in this theme will be highly detrimental to its future performance.
2	**Follower**	The company's activity in this theme will be detrimental to its future performance.
3	**Neutral**	The company's activity in this theme will have a negligible impact on the company's future performance, or this theme is not currently relevant for this company.
4	**Leader**	The company is a market leader in this theme. The company's activity in this theme will improve its future performance.
5	**Dominant**	The company is a dominant player in this theme. The company's activity in this theme will significantly improve its future performance.

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How do our research reports fit into our overall thematic research ecosystem?

Our thematic research ecosystem is designed to assess the impact of all major themes on the leading companies in a sector. To do this, we produce three tiers of thematic reports:

- **Single theme**: These reports offer in-depth research into a specific theme (e.g., artificial intelligence). They identify winners and losers based on thematic leadership, market position, and other factors.
- **Multi-theme**: These reports cover all themes impacting a sector and the implications for the key players in that sector.
- **Sector scorecard**: These reports identify those companies most likely to succeed in a world filled with disruptive threats. They incorporate our thematic screen to show how conflicting themes interact with one another, as well as our valuation and risk screens.

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Buy the report now and get full access.

You are currently reading sample pages of the Tech Predictions 2025 – Strategic Intelligence report.

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Key Highlights from the Tech Predictions 2025 – Strategic Intelligence Report:

- The report identifies and analyses 25 themes that will impact every industry in 2025.
- Each theme has been classified into three groups: technology, macroeconomic, and ESG.
- The report includes quantitative and qualitative predictions for each theme in 2025, including market forecasts.

If you have any questions or need additional information:	reportstore@globaldata.com +44 (0) 20 7947 2960

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About GlobalData

GlobalData is a leading provider of data, analytics, and insights on the world's largest industries. In an increasingly fast-moving, complex, and uncertain world, it has never been harder for organizations and decision makers to predict and navigate the future. This is why GlobalData's mission is to help our clients to decode the future and profit from faster, more informed decisions. As a leading information services company, thousands of clients rely on GlobalData for trusted, timely, and actionable intelligence. Our solutions are designed to provide a daily edge to professionals within corporations, financial institutions, professional services, and government agencies.

Unique Data

We continuously update and enrich 50+ terabytes of unique data to provide an unbiased, authoritative view of the sectors, markets, and companies offering growth opportunities across the world's largest industries.

Expert Analysis

We leverage the collective expertise of over 2,000 in-house industry analysts, data scientists, and journalists, as well as a global community of industry professionals, to provide decision-makers with timely, actionable insight.

Innovative Solutions

We help you work smarter and faster by giving you access to powerful analytics and customizable workflow tools tailored to your role, alongside direct access to our expert community of analysts.

One Platform

We have a single taxonomy across all of our data assets and integrate our capabilities into a single platform – giving you easy access to a complete, dynamic, and comparable view of the world's largest industries.

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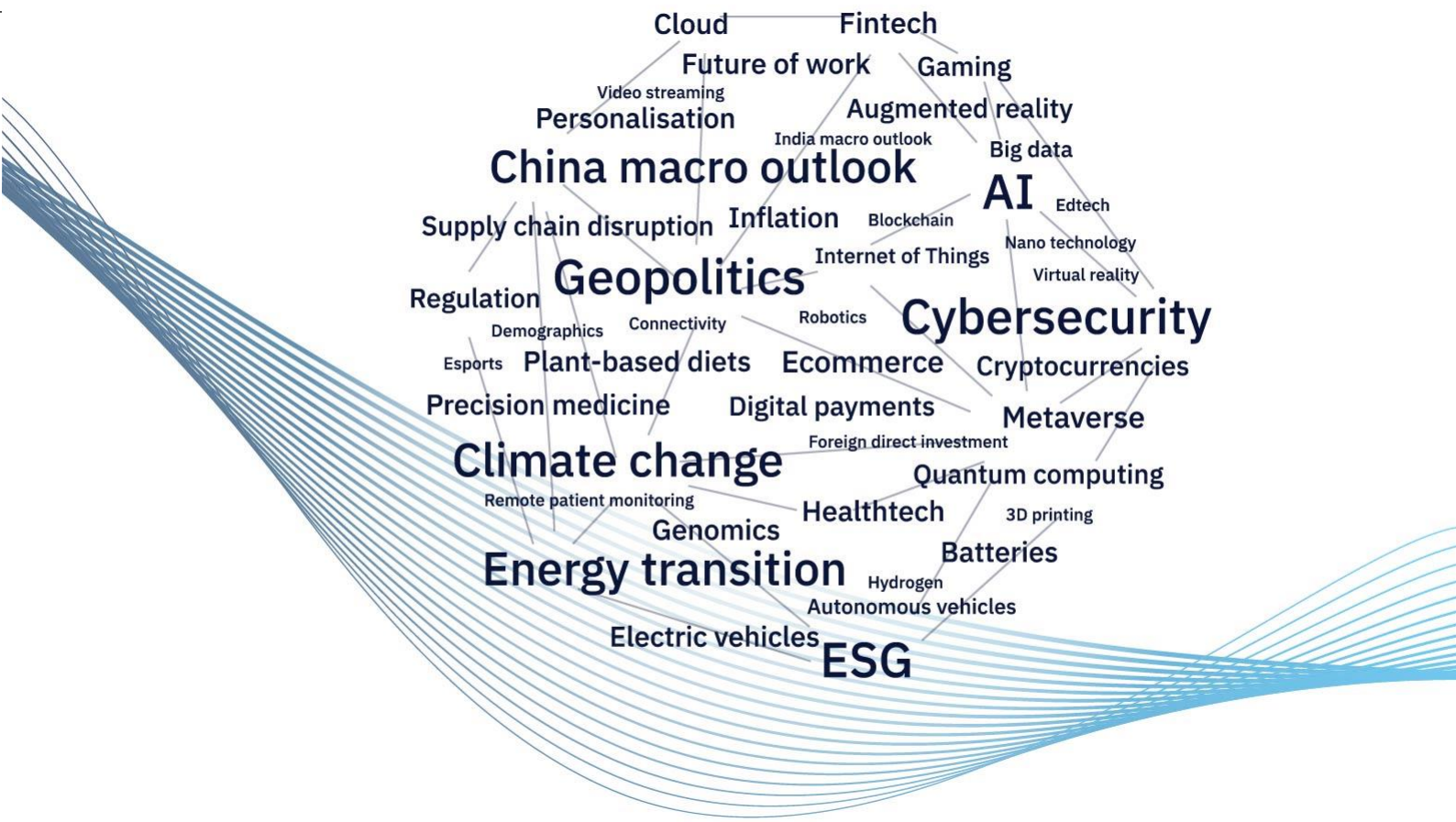

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