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2025 Research Themes

Topics shaping the industry and driving our focus

The GSMA is a global organisation unifying the mobile ecosystem to discover, develop and deliver innovation foundational to positive business environments and societal change. Our vision is to unlock the full power of connectivity so that people, industry, and society thrive. Representing mobile operators and organisations across the mobile ecosystem and adjacent industries, the GSMA delivers for its members across three broad pillars: Connectivity for Good, Industry Services and Solutions, and Outreach. This activity includes advancing policy, tackling today's biggest societal challenges, underpinning the technology and interoperability that make mobile work, and providing the world's largest platform to convene the mobile ecosystem at the MWC and M360 series of events.

We invite you to find out more at www.gsma.com

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GSMA Intelligence is the definitive source of global mobile operator data, analysis and forecasts, and publisher of authoritative industry reports and research. Our data covers every operator group, network and MVNO in every country worldwide – from Afghanistan to Zimbabwe. It is the most accurate and complete set of industry metrics available, comprising tens of millions of individual data points, updated daily.

GSMA Intelligence is relied on by leading operators, vendors, regulators, financial institutions and third-party industry players, to support strategic decision-making and long-term investment planning. The data is used as an industry reference point and is frequently cited by the media and by the industry itself.

Our team of analysts and experts produce regular thought-leading research reports across a range of industry topics.

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The thinking behind the 2025 Research Themes

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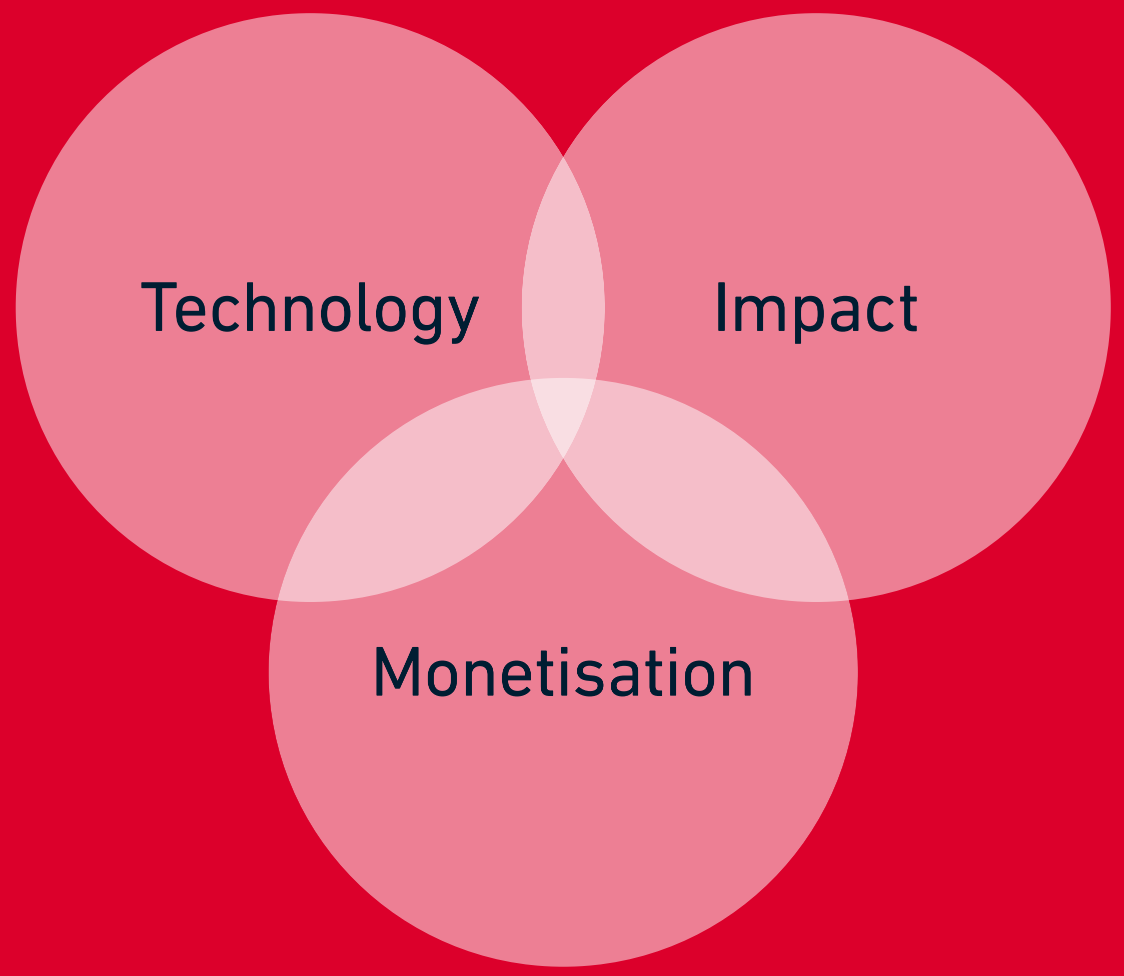
Transition from 2024 to 2025

- Throughout 2024, we have analysed important developments and trends spanning all areas of the telecoms industry and wider digital ecosystem. As the industry will continue to evolve in 2025, how will our Research Themes change?
- Most of our 2024 Research Themes will continue to run their course; though some will have new angles to analyse. In 2024, we elevated AI and eSIM to standalone themes. For 2025, we are also elevating 5G fixed wireless access (FWA) and satellites and non-terrestrial networks (NTNs) to standalone themes. While both are not new topics, we expect growing industry developments (and hence research focus) in 2025.

Three major areas of focus

- Our 2025 Research Themes span three important areas of developments and innovations in the telecoms industry and wider digital ecosystem: technology, monetisation and impact.
- The common objective of our 2025 Research Themes across the three areas is to address the key trends and questions shaping the evolution of the industry, and what they mean for operators and all relevant stakeholders.



What's ahead

The 2025 Research Themes set the direction of the GSMA Intelligence 2025 Research Agenda and will be addressed throughout the year through reports, insights, surveys, presentations at industry conferences, briefings with clients, blogs, webinars and infographics.

2025 Research Themes

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Network transformation
Connecting innovation to market demands

AI
Accelerating adoption and transformational impact

Digital industries
Capturing the B2B opportunity in the enterprise digital transformation era

Consumer 5G
Turning adoption into monetisation

Fixed broadband and 5G FWA
Capitalising on network and service innovation

Consumer technology
Reshaping value through device and service innovation

eSIM
Seeking scale in smartphones and IoT

Satellites and NTNs
Moving from network building to commercial momentum

Mobile impact
Scaling the digital economy through the reach of mobile and regulatory reforms

Spectrum
Maximising value through effective management

Energy efficiency and circularity
Advancing sustainability practices in telecoms and beyond

Network transformation

Connecting innovation to market demands

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2025 areas of focus

- **Operator network transformation agendas:** network strategies and technology priorities; investment plans and associated capex; 5G network evolution; advancements in network energy efficiency; 2G and 3G network sunsets; VoLTE and VoNR rollout.
- **New network technologies:** progress with and impact of network APIs, open RAN, network/cloud integration, edge computing, genAI and wider AI technology, private networks, RedCap and more; operator priorities and deployment challenges.
- **5G network evolution:** rollout of 5G standalone (SA) networks beyond pioneering operators; early launch of 5G-Advanced networks and associated network capabilities and priority use cases; 6G planning and messaging.
- **Network APIs:** progress with commercialisation and use cases; footprint expansion; players driving momentum; new developments in the supply chain; supply versus demand dynamics.
- **Fixed broadband networks:** investment in fibre rollout; next wave of 5G FWA network launches; new fixed network developments such as FTTR, gigabit networks and use of AI technology; sunsetting of legacy copper-based networks.

$180bn

Mobile operator capex in 2025 globally ($1.1 trillion cumulative during 2025–2030)

57

Number of operators that have launched 5G SA networks as of Q3 2024 (88 have announced plans to launch, bringing the total to 145 across 63 countries)

74%

Operators, representing 74% of total mobile connections globally, have committed to the GSMA's Open Gateway initiative

Key 2024 research

- The 5G-Advanced era: the importance of 5G's evolution for the mobile core
- After a slow start, the rollout of 5G SA networks is set to accelerate over the next two years
- Network Transformation
- GSMA Open Gateway: State of the Market, H1 2024
- Early trends for 5G RedCap: Asia Pacific leads the way in trials and deployments
- 5G Next: How digitalisation is leading to advanced capabilities for antennas
- Edge compute: coming to a place near you
- 5G and network transformation: five trends to watch in 2024
- FTTR: taking fixed broadband connectivity to the next level
- The rise of copper-based fixed network switch-offs: key factors to consider

AI

Accelerating adoption and transformational impact

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2025 areas of focus

- **AI at large:** developments in genAI and wider AI across networks, platforms, services and devices; companies driving momentum; AI tech innovation roadmap; competition and partnership dynamics; policy/regulation perspective.
- **AI in telco:** state of deployment and adoption in networks (core and RAN), customer care and service personalisation, and operations; best practices; operator strategies, plans and expectations; opportunities and deployment challenges; operator AI readiness and maturity benchmark.
- **AI in devices and digital services:** tech roadmap and use cases seeing greatest innovation; companies driving progress and their approaches to AI monetisation; AI impact on customer experience.
- **Enterprise adoption of AI:** state of adoption and enterprise views on the importance of AI for digital transformation; enterprise spend on AI and vertical sectors and countries leading investments; enterprise AI use cases and business impact areas; benefits and deployment challenges.
- **Consumer adoption of AI:** consumer interest in and use of AI applications; consumer behaviour for genAI across areas such as awareness, frequency of usage, satisfaction or dissatisfaction with existing services, and activities set to benefit the most.

74%

Share of operators that have either commercially deployed or are testing genAI solutions

33%

Share of enterprises undertaking digital transformation that are already making advanced use of AI technology (average of genAI and wider AI)

75%

Share of consumers who are aware of genAI (of these, 59% are users and among users, 67% are satisfied with their experience)

Key 2024 research

- Telco AI: State of the Market, Q3 2024
- Generative AI: navigating tech developments, operator adoption and consumer expectations
- Generative AI in Focus: Consumer Behaviour and Operator Views Survey Dashboard 2024
- A new wave of AI solutions is coming for the industrial world – but can it achieve scale?
- Generative AI for consumer use cases: the five tech areas that are seeing the most innovation
- MWC Las Vegas 2024: AI, IoT and NTNs support the digital transformation of enterprises
- IBC 2024: AI helps a fast-evolving media & entertainment industry better monetise content and reduce costs
- IFA 2024: AI dominates the show
- Telco AI: State of the Market, Q2 2024
- Generative AI makes progress but challenges remain in reliability and information provision

Digital industries

Capturing the B2B opportunity in the enterprise digital transformation era

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2025 areas of focus

- **Digital transformation of industries:** progress with enterprise digital transformation across vertical sectors and countries; enterprise digital transformation objectives, needs, priorities and spend; technology supplier decisions and drivers behind it; use of technologies and deployment challenges.
- **Technologies enabling digital transformation:** developments in cloud, edge, genAI and wider AI, IoT, cybersecurity, network APIs and more; security landscape and innovation; competition and partnership dynamics.
- **5G and private networks for enterprises:** state of the market; operator versus end-user views on future demand, use cases, benefits and deployment challenges; vertical sectors leading growth in demand; spectrum implications.
- **Operator B2B strategies and monetisation:** strategic objectives and value propositions; speed of B2B revenue growth and future opportunities; technologies and services driving growth; innovation in connectivity and services beyond connectivity; operator B2B monetisation routes.
- **IoT:** market size (connections and revenues) and growth outlook by region and vertical; emerging trends and drivers; operator strategies and plans; impact of new technologies such as RedCap, passive IoT, eSIM, iSIM and satellite.

10%

Enterprise spend on digital transformation as percentage of enterprise revenue during 2024–2030

$400bn

Addressable market for operators in B2B technologies and services beyond connectivity

26bn

Number of IoT connections (cellular and beyond) globally by the end of 2025 (46%/54% split between consumer and enterprise IoT)

Key 2024 research

- The rise of digital industries: navigating enterprise needs, investments and supplier decisions
- The opportunity for operators in B2B technology services
- IoT market outlook: trends and drivers shaping connections growth through to 2030
- Enterprise Opportunity 2024: operator strategies, plans and expectations
- Operators in Focus: Enterprise Opportunity Survey Dashboard 2024
- Road and rail: connectivity and telco services driving smart mobility
- How manufacturing, production and industrial companies work with telcos to accelerate their digital transformation
- How financial services companies and telcos work together to accelerate convergence of mobile and fintech
- Private 5G networks: time to scale up
- Telco security landscape and strategies: Asia Pacific

Consumer 5G

Turning adoption into monetisation

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2025 areas of focus

- **5G adoption:** growth path for 5G mobile connections globally; markets surpassing 50% penetration and underlying drivers of success; markets and regions driving the next wave of 5G network launches and users.
- **5G user behaviour:** key changes across multiple areas, such as 5G user experience (e.g. satisfaction or dissatisfaction with 5G networks), willingness to pay more for 5G subscriptions, interest in 5G use cases and bundles, and 5G user engagement with digital entertainment and activities.
- **5G monetisation:** operator tariff and service innovation (e.g. shift to speed-based tariffs and experience-based differentiated services); impact of 5G adoption on mobile data traffic and ARPU; markets leading the way on ARPU growth and drivers (e.g. services, content, tariffs).
- **5G devices:** new trends in device availability, pricing and innovation across smartphones, 5G FWA equipment and other consumer devices.
- **5G services beyond connectivity:** 5G impact on service convergence and bundling; developments in consumer services that benefit from 5G such as mobile and cloud gaming, video, in-venue entertainment, XR (e.g. AR and VR), the metaverse and 5G new calling.

2.6bn

Number of 5G mobile connections globally by the end of 2025 (29% of total mobile connections)

82%

Average share of 5G users who claim 5G has met or exceeded their expectations

5%

Consumers who intend to upgrade to 5G are willing to pay 5% extra versus what they pay for their current 4G subscription

Key 2024 research

- Revisiting 5G monetisation: upping the experience
- Five years of 5G for consumers: how user behaviour and experience are changing
- Consumers in Focus: 5G User Behaviour Survey Dashboard 2024
- Will 5G new calling breathe new life into mobile voice services?
- Mobile data traffic will grow over fourfold by the end of the decade, with multiple growth drivers
- Insight Highlights State of 5G commercialisation and adoption, Q1 2024
- 5G in Context, Q2 2024
- XR makes quiet progress towards an augmented future
- The State of 5G in 2024
- Smartphone sales return to growth: four ways for OEMs to capitalise

Fixed broadband and 5G FWA

Capitalising on network and service innovation

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2025 areas of focus

- **Fixed broadband:** state of the market and penetration outlook; customer shifts in the access technology mix and technologies growing the most; operator strategies and commercial practices shaping growth and innovation.
- **Fixed-mobile convergence:** shifting consumer behaviour impacting traditional quad-play bundles; new flavours of bundles that are emerging; operator multiplay strategies and propositions; commercial partnerships for digital entertainment and services.
- **5G FWA commercialisation:** progress across multiple areas such as network and service launches, spectrum in use, and CPE availability and innovation; 5G FWA market segmentation; digital inclusion initiatives that leverage FWA; early use of RedCap technology.
- **5G FWA opportunity:** main scenarios for customer adoption; countries leading on adoption and associated drivers; consumer interest in 5G FWA services; operator strategies and commercial practices for 5G FWA.
- **5G FWA for enterprises:** enterprise interest in FWA as a 5G capability; vertical sectors and countries showing higher interest; operator approaches and strategies to grow 5G FWA enterprise adoption.

76%

FTTP/B share of total fixed broadband connections in 2025

139

Number of operators that have launched 5G FWA networks, across 68 countries as of September 2024

7

Number of countries that will have a 5G FWA share of total fixed broadband connections greater than 15% by 2030

Key 2024 research

- The future of fixed broadband: trends and drivers disrupting the market
- Fixed and Pay-TV Markets, Q2 2024: developments and outlook
- 5G FWA: state of the market, new trends and commercial practices shaping growth
- Global outlook for 5G FWA services: customer adoption forecasts through to 2030
- 5G FWA resonates in the US but is its early success replicable elsewhere?
- 5G FWA makes inroads in the enterprise segment: how far will it go?
- Gigabit broadband providers can explore five routes to monetisation
- FTTR: taking fixed broadband connectivity to the next level
- The rise of copper-based fixed network switch-offs: key factors to consider
- Insight Highlights – Fixed broadband and 5G FWA: state of play and outlook, Q2 2024

Consumer technology

Reshaping value through device and service innovation

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2025 areas of focus

- **Evolution of devices:** progress with and impact of new technologies such as AI, foldables, XR, eSIM and satellite; wearables and smart home innovation; smartphone sales recovery and implications for mobile players; OEM market share changes and competitive dynamics.
- **Consumer behaviour for smartphones:** replacement rate trends and most important features driving consumer choices; loyalty to brands; sales channel preferences when purchasing a new smartphone; behaviour for preowned refurbished smartphones.
- **Digital entertainment and services:** innovation in gaming, pay TV, fintech and other digital services; shifting consumer preferences in the digital era; competition and partnership dynamics; AI implementation and impact.
- **Pay TV and video:** shifting consumer behaviour and drivers; cord cutting impact on traditional pay TV; tech and market developments; customer adoption trends; commercial practices shaping innovation and growth; state of the market and outlook for telcos and OTT players.
- **Operator strategies:** routes to monetise innovation in devices and digital services; new retail strategies; rise of digital brands and digital-first or digital-only propositions; evolution of telco bundling.

78%

Share of smartphone users who intend to replace their smartphone with the same brand (i.e. brand loyalty)

60%

Share of consumers playing digital games at least once per week

21

Number of pay-TV markets that will see a decline in traditional pay-TV connections between 2024 and 2030 (cord-cutting impact)

Key 2024 research

- OEM smartphone market shares across the globe: leaders, followers and challengers in an increasingly competitive market
- OEMs in Focus: Smartphone Market Shares Dashboard
- Smartphone sales return to growth: four ways for OEMs to capitalise
- Digital gaming: the rise of cloud, mobile and new tech to enhance the gamer experience
- Consumers in Focus: Gaming Consumer Behaviour Survey Dashboard 2024
- Pay TV: consumer trends and commercial practices shaping competition and adoption
- Tracking the wearables market and the upswing in consumer interest
- Unlocking the smart home: the trends and drivers shaping innovation and growth
- Online TV subscriptions: the sun is still shining but clouds are gathering
- Refurbished smartphones: consumers look to savings over sustainability

eSIM
Seeking scale in smartphones and IoT

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2025 areas of focus

- **eSIM in the consumer market:** progress with commercialisation of eSIM devices and eSIM connectivity services; OEM and operator approaches to eSIM; eSIM-only smartphone outlook; eSIM impact on mobile market metrics; eSIM for 5G FWA.
- **Consumer behaviour:** awareness of eSIM and factors behind it; interest in using eSIM; reason for lack of eSIM interest; use of eSIM for international roaming and associated preferences for eSIM roaming services.
- **eSIM in the IoT enterprise market:** progress with specifications; emerging use cases across vertical sectors; impact of eSIM on IoT market growth; impact of new IoT technologies on eSIM; outlook for eSIM in private networks.
- **Stakeholders' views and expectations:** operator and end-user enterprise views on vertical sectors driving demand for eSIM, market share of eSIM in the IoT market (compared to iSIM and traditional/removable SIM), eSIM benefits for IoT and eSIM deployment challenges.
- **eSIM innovation:** new eSIM-enabled services for consumers and enterprises; new business models leveraging eSIM as a main connectivity form factor; MNO and MVNO consumer eSIM strategies and propositions (e.g. eSIM first, eSIM-only and eSIM for international roaming).

~440

Number of mobile service providers offering commercial eSIM service for smartphones as of June 2024

~70%

Growth in number of eSIM smartphone connections globally in 2025 (year on year)

42%

eSIM share of total IoT cellular connections by 2030 (average across 21 countries)

Key 2024 research

- Insight Highlights – eSIM: consumer trends and enterprise demands, Q3 2024
- Scaling eSIM in IoT markets: new tech and market developments should help accelerate adoption
- Consumers in Focus: eSIM Consumer Behaviour Survey Dashboard 2024
- eSIM in the consumer market: how far has it come in the last five years?
- eSIM in the consumer market: tracking devices and services launches, forecasting adoption through to 2030
- Large-scale adoption of eSIM in the US has had no impact on consumer churn so far
- Accelerating eSIM globally: state of the consumer market, user behaviour and adoption growth scenarios
- Smartphone sales return to growth: four ways for OEMs to capitalise
- IoT market outlook: trends and drivers shaping connections growth through to 2030

Satellites and NTNs

Moving from network building to commercial momentum

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2025 areas of focus

- **Business momentum for satellites and NTNs:** developments across multiple areas such as commercial, technology and regulation; technology/competitive landscape and outlook; companies driving momentum.
- **Telco satellite and NTN footprint:** progress with satellite service commercialisation; markets and regions driving momentum; network coverage; partnerships between telecoms operators and satellite companies; operator commercial strategies to monetise satellite services.
- **Telco-satellite integration:** shift from the technology to the business/commercial stage; value of satellite in bridging mobile network coverage gaps and supporting IoT use cases.
- **Satellite for IoT:** developments in standards and specifications; companies driving momentum; progress with commercial solutions that integrate mobile IoT with satellite network services; new devices, form factors and use cases; competition and partnership dynamics.
- **Implications at large:** implications of satellite momentum and commercialisation on devices, chipset, networks, services and spectrum.

91

Number of operators that have partnered with satellite players to offer satellite connectivity in their services

2bn

Number of IoT devices that are addressable from satellite-enabled connectivity (10% of the IoT base by 2035)

$30bn

By the end of 2035, satellite-backed connectivity is estimated to generate more than $30 billion per year for operators

Key 2024 research

- Satellite and NTN tracker, Q3 2024
- Can satellite connectivity help mobile IoT reach for the stars?
- Radar: satellites and telcos
- MWC Las Vegas 2024: AI, IoT and NTNs support the digital transformation of enterprises
- Satellite and NTN tracker, Q2 2024
- IoT market outlook: trends and drivers shaping connections growth through to 2030
- IoT Connections Forecast to 2030
- Skywaves and airwaves: the case for risk mitigation with drones

Mobile impact

Scaling the digital economy through the reach of mobile and regulatory reforms

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2025 areas of focus

- **Mobile impact:** the value of leveraging mobile technology to support digital economy growth and accelerate digital inclusion; the rise of digital nations; industry progress towards meeting the Sustainable Development Goals (SDGs) and the road ahead to meet the long-term goals.
- **Mobile internet connectivity:** industry progress on reducing the mobile broadband usage gap; the drivers and the key barriers to mobile internet adoption and use.
- **5G for digital transformation:** assessment of 5G progress in supporting digital transformation and economic impact across multiple areas such as spectrum, network, affordability and market development; implications for industry stakeholders and policymakers.
- **Policy and regulation:** assessment of reforms needed to support mobile impact across multiple areas such as competition, quality of service, efficient network use, demand-side stimulation, optimal framework for network investments, and removal of supply-side barriers.
- **Mobile investment gaps:** assessment of the additional investment required to bridge mobile coverage and usage gaps; areas of market reform that can help unlock investments and improve affordability by correcting existing market and government failures.

5.4%

In 2023, mobile technologies and services generated 5.4% of global GDP (a contribution of $5.7 trillion of economic value added)

4.6bn

By the end of 2023, the number of people using mobile internet increased to 4.6 billion people (57% of the global population)

45

Average 5G development score of 39 countries, based on the 5G Connectivity Index as of June 2024

Key 2024 research

- The State of Mobile Internet Connectivity 2024
- The State of 5G in 2024
- The Mobile Economy 2024
- Digital Nations in Asia Pacific: preserving digital trust
- Digitalisation and the Africa We Want: Introducing the GSMA Digital Africa Index
- Towards an inclusive digital nation: building trust in the digital age in Asia Pacific
- Connectivity in Crisis: The Humanitarian Mobile Coverage Gap
- Mobile Investment Gaps: Caribbean islands
- The impact of mobile money interoperability on financial inclusion

Spectrum

Maximising value through effective management

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2025 areas of focus

- **Spectrum for 5G and beyond:** new 5G spectrum auctions, assignments and outcomes across low-, mid- and high-frequency bands; 5G spectrum pricing dynamics; spectrum frequencies used for 5G network launches; assessment of future spectrum needs for 5G and beyond (WRC-27 preparation work).
- **New spectrum models:** new trends in spectrum assignment requirements; new approaches to spectrum fees such as assigning spectrum in exchange for connectivity, coverage and infrastructure build; local licensing; dynamic spectrum sharing.
- **Effective spectrum management:** efficient use of spectrum to maximise impacts on socioeconomic developments, digital economy growth and climate change mitigation; policy and regulatory implications.
- **Spectrum for vertical industries:** optimal approach to assigning spectrum for vertical sectors; impacts of spectrum set-asides and ineffective spectrum policies.
- **Mobile network sunsets and tech neutrality:** state of 2G and 3G sunsets and outlook; regional approaches; tech neutrality and spectrum migration; correlation between 5G network launches and 2G/3G sunsets; sunset implications for devices and services (e.g. VoLTE, VoNR, IoT).

100

Number of countries globally where spectrum bands that can be used for 5G services have been assigned as of September 2024

23

Number of countries globally where mmWave spectrum bands have been assigned as of September 2024

42 & 58

Number of 2G and 3G networks (respectively) that will be shut down during 2025–2030 based on operators' announced plans

Key 2024 research

- Mobile Evolution in 6 GHz
- Spectrum Navigator, Q2 2024
- The advent of 5G has accelerated the trend of 2G/3G sunsets
- The Impact of Spectrum Set-Asides on Private and Public Mobile Networks
- Insight Highlights - 5G spectrum state of play, Q1 2024
- Network Sunsets, Q2 2024
- Technology Neutrality and Legacy Network Sunsets
- Spectrum: five trends to watch in 2024
- Insight Highlights – Mobile Network Sunsets, Q4 2023

Energy efficiency and circularity

Advancing sustainability practices in telecoms networks and beyond

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2025 areas of focus

- **Energy efficiency in telecoms networks and beyond:** enhancements across telco networks (mobile and fixed), computing and data centres; energy implications of shifting 4G and 5G workloads to the cloud and edge.
- **Enablement effect:** mobile and digital technology implementation strategies to decarbonise vertical industries; decarbonising compute through architecture improvements at the chipset, edge and cloud data centre levels of the value chain.
- **Circular economy:** advancements in devices and networks; supply-chain efforts to design reusable products; development of secondary markets for metals recycling and trading; operator strategies and practices for the circular economy; consumer behaviour for preowned refurbished smartphones (e.g. interest and drivers and propensity to pay).
- **Net zero:** telecoms industry progress and drivers; outstanding barriers that could hold back progress towards net zero by 2050.
- **ESG:** shift to common reporting KPIs; impact on external reputation from different stakeholders (e.g. staff, suppliers, investors, regulators).

70%

Share of operators that see sustainability as a 'very' or 'extremely' important network transformation priority

1%

Percentage of global energy use attributed to operator networks (fixed and mobile)

50%

Operators accounting for 50% of global market share have committed to net zero

Key 2024 research

- ESG Metrics for Mobile: insights from early adopters
- Troubleshooting energy pain points
- Decarbonising compute: from the ground up
- Going green: measuring the energy efficiency of mobile networks
- Telcos and virtual power plants: green energy, green profit
- 5G Next: How a new automation layer can increase overall energy efficiency
- Bringing virtual power into practice
- Pushing the edge to net zero
- Refurbished smartphones: consumers look to savings over sustainability
- Green shoots: a new model for renewables from the GCC
- Rural renewal: telcos and sustainable energy in Africa

The 2025 Research Themes cut across all content modules

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	Mobile Operators & Networks	Fixed, TV & Convergence	IoT & Enterprise	Digital Consumer	Spectrum
Network transformation	✓	✓	✓	✓	✓
AI	✓	✓	✓	✓	
Digital industries	✓	✓	✓		✓
Consumer 5G	✓			✓	✓
Fixed broadband and 5G FWA		✓		✓	✓
Consumer technology	✓	✓	✓	✓	
eSIM	✓		✓	✓	
Satellites and NTNs	✓	✓	✓	✓	✓
Mobile impact	✓		✓	✓	✓
Spectrum	✓		✓		✓
Energy efficiency and circularity	✓	✓	✓	✓	

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Our content, data, research, insights…and value

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Mobile Operators & Networks	Fixed, TV & Convergence	IoT & Enterprise	Digital Consumer	Spectrum

50 million data points updated daily. 170 data metrics modelled and forecast to 2030. More than 200 reports published annually.

Data

Mobile Operators & Networks	Fixed, TV & Convergence	IoT & Enterprise	Digital Consumer	Spectrum
– Granular coverage of mobile operators and market metrics across all countries – Historical data and forecasts to 2030 – Subscribers, connections, network and operational data, ARPU and financials – Operator Network Transformation Survey – Satellite and NTN Tracker	– Granular coverage of fixed voice, broadband and pay TV across 36 of the world's largest markets – Historical data and forecasts to 2030 – Fixed voice, broadband and pay-TV connections, bundling and convergence, financials – Product and Service Tracker – 5G FWA coverage globally	– IoT connections and revenue – Historical data and forecasts to 2030 – Cellular & non-cellular connections, enterprise & consumer connections across vertical use cases – Operator Enterprise Opportunity Survey – Global Digital Transformation Survey (enterprise survey)	– Global consumer survey of major markets – Interactive consumer survey dashboards covering 5G, gaming, video services, devices, eSIM, the metaverse and genAI (with filters for specific consumer segments) – eSIM: devices, services, adoption forecast to 2030	– Tracker of spectrum auctions, assignments, pricing, licence duration and obligations – Granular data covering 200+ countries and 1,000+ operators worldwide, from 1980 to today – Spectrum for 5G and previous-generation networks – Network sunsets and rollout of 5G SA, open RAN and VoLTE

Research

Spotlights: weekly reports covering important trends, developments and events in the telecoms/digital ecosystems and their implications for ecosystem players

Industry deep dives: quarterly reports on specific topic streams with in-depth analysis of the market and future outlook, including major trends and competitive dynamics

Insightful charts: a monthly graphic providing a visual way of telling an important story or development in the industry – turning data into insights

Operator case studies: a concise and consistent way to shine some light on operators' strategies and business models, as well as how they are launching new services

Regional research: Mobile Economy reports and Region in Focus series examining major trends (technology, market, policy and regulation) shaping the regional telecoms landscapes

Bespoke consulting: on-demand, customised research on industry topics including megatrends, technology/service innovation, economic and social impact of mobile technology and spectrum

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