

MWC 26: What Did We Learn?

Presented by GSMA Intelligence

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GSMA Intelligence

Every mobile operator. Every network.
Every spectrum assignment.



Backed by the GSMA, GSMA Intelligence provides a 360° intelligence platform delivering insights, forecasts and research across IoT, 5G, Open RAN, NTN, AI and the wider telecoms ecosystem.

2026 research themes

Tech transformation

 Telco networks

 AI

 Emerging technologies

 Security

Service innovation and monetisation

 Digital industries and B2B

 eSIM and IoT

 Consumer devices and services

 Digital home

Mobile impact

 Industry value

 Digital economy

 Spectrum

 Sustainability



Data and analytics

- 50M+ data points, 4,500 networks, 2,000–2030 forecasts
- Operator & market benchmarks, technology tracking
- Verified global data across mobile, fixed, IoT & devices



Research and insights

- 200+ annual reports across 17 telecom & digital topics
- Quarterly market reviews and technology deep dives
- Expert analysis on 5G, IoT, AI, devices, convergence & more



Consulting and events

- Custom research, strategy projects & market assessments
- Sponsored reports and thought-leadership programmes
- MWC event support (content, insights, briefings)



Tools

- Spectrum Navigator & Network Sunsets dashboards
- Coverage maps
- Premium data suite

MWC in the rearview

it's been a long week, but hopefully you remember where you are

INTELLIGENT
INFRASTRUCTURE
∞

CONNECT
AI

AI⁴
ENTERPRISE

TECH
4 ALL

AI[★]
NEXUS

GAME
CHANGERS
⚡



MWC 2026 themes & expectations: Intelligent infrastructure

5G-Advanced vs. Standalone? doesn't matter without devices and ROI

INTELLIGENT
INFRASTRUCTURE

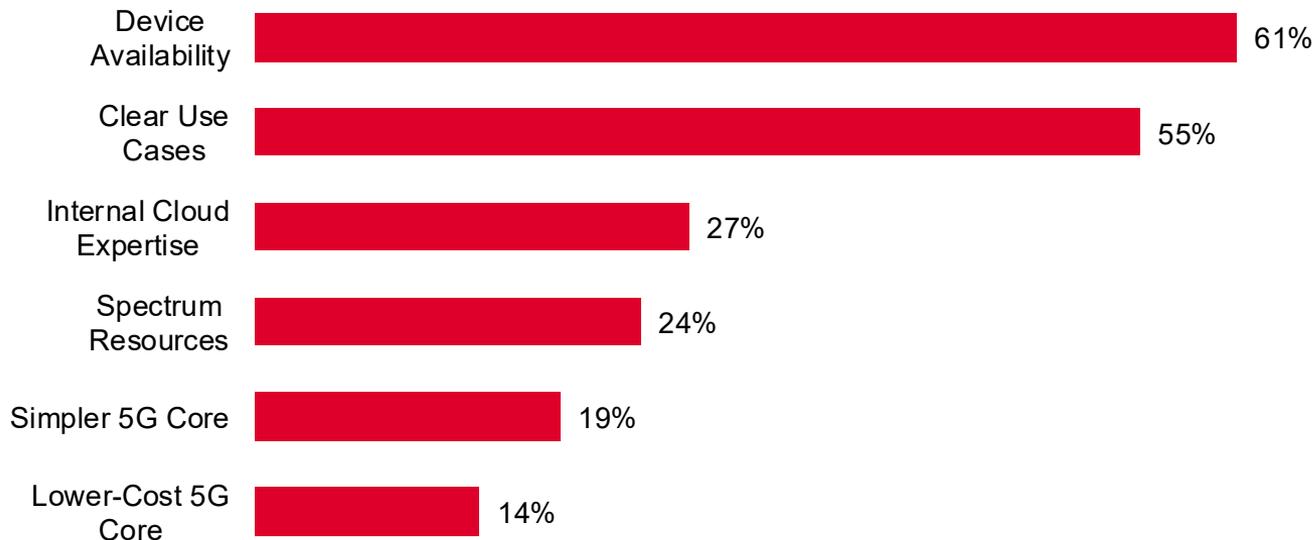


Intelligent Infrastructure

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What would accelerate deployment of Standalone 5G?



MWC 2026 themes & expectations: Intelligent infrastructure

technology battles are giving way to architecture battles

INTELLIGENT
INFRASTRUCTURE



Intelligent Infrastructure

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Cloud

Satellite

HAPS

Resilience

Open RAN

6G

MWC 2026 themes & expectations: ConnectAI

"telco" for AI still a minor priority 👉 AI for networks will dominate

CONNECT
AI

ConnectAI

THEME SPONSOR:

HONOR

Top Telco Business Objectives for AI: 2026



MWC 2026 themes & expectations: AI 4 Enterprise

AI biggest area of investment; security and cost efficiencies main drivers

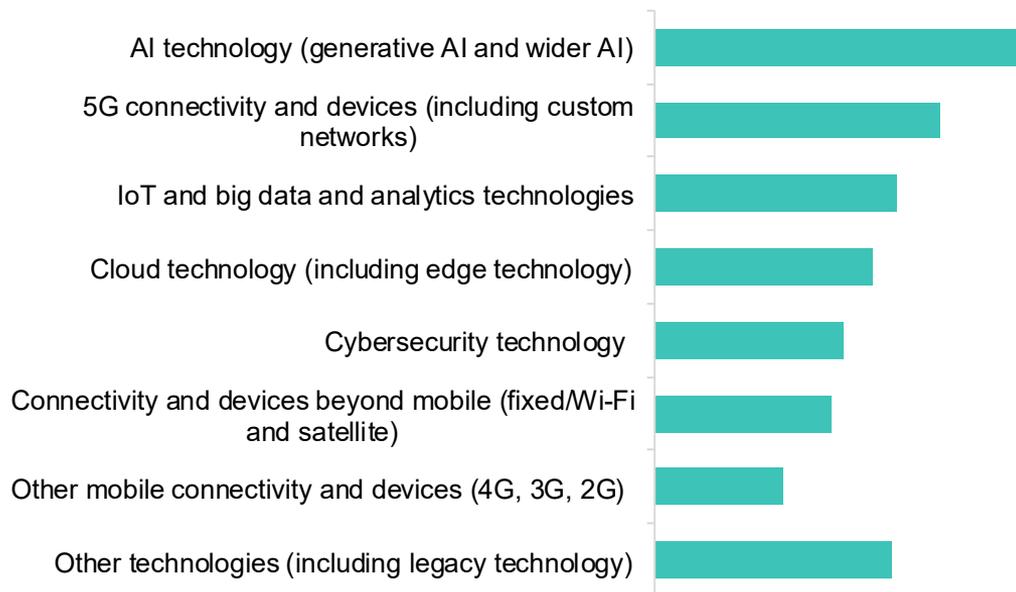
AI 4 ENTERPRISE

AI 4 Enterprise

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Enterprise spend on digital transformation by technology (2025–2030)



MWC 2026 themes & expectations: AI Nexus

countries are scrambling to develop AI strategies and telcos want to help

AI NEXUS

AI Nexus

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Source: WEF / BAIN

MWC 2026 themes & expectations: Tech 4 All

major market moves aside, sovereign is most important for small markets

TECH 4 ALL

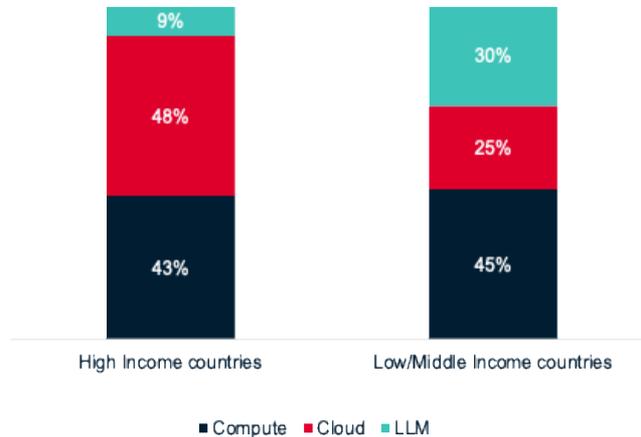
Tech4All

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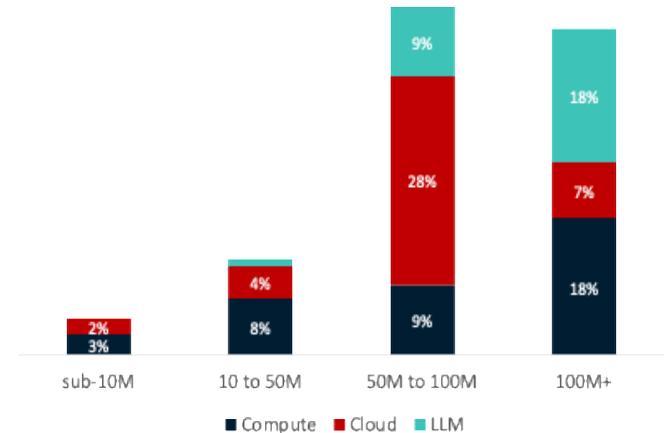
Use Case by Market Type

Income Distribution



MNOs Activity by Market Type

Population Distribution



MWC 2026 themes & expectations: Tech 4 All

skills/expertise rank as the top barrier to AI rollout for telcos – no surprise

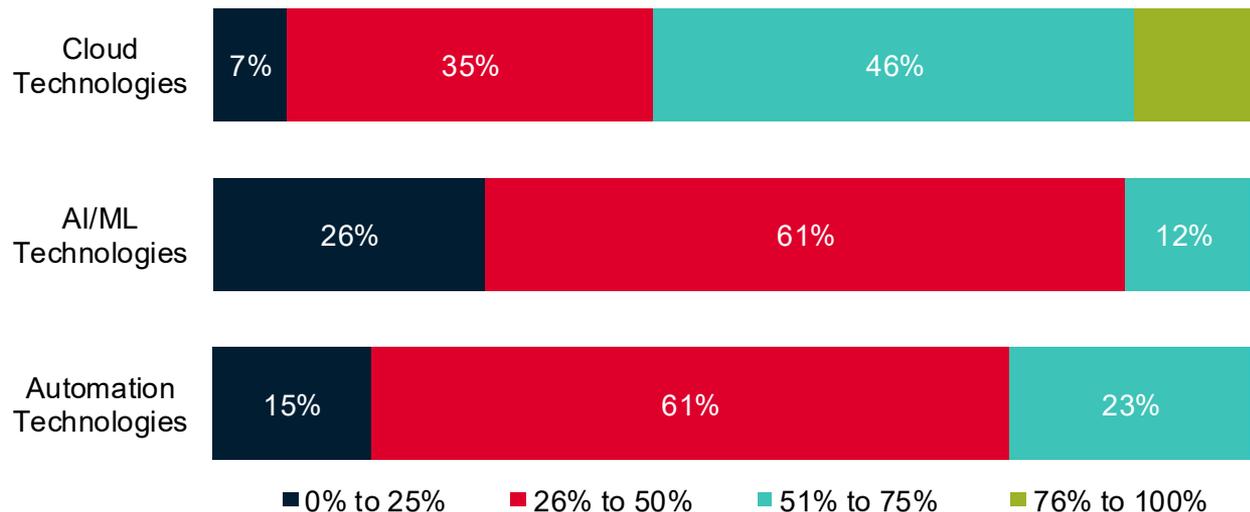
TECH 4 ALL

Tech4All

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Share of telco staff trained in key tech priorities in past 12 months



MWC 2026 themes & expectations: Game Changers

spectrum and commercialization dominate the NTN narrative



Game Changers

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Satellite operator	Commercially live telecoms operator partnerships*	Planned telecoms operator partnerships*
AST SpaceMobile	0	32
Lynk	3	24
Starlink	10	13
SES/Intelsat**	8	12
Eutelsat OneWeb	3	10
Others	15	42
Total/average	39	133

MWC 2026 themes & expectations: Game Changers

spectrum and commercialization dominate the NTN narrative

GAME CHANGERS



Game Changers

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Constellation provider	Spectrum model	L band	S band	MNO holdings (IMT)	Ka	Ku
Starlink (Echostar)	IMT / MSS					
AST Space Mobile	IMT					
Lynk	IMT					
Amazon Leo (formerly Kuiper)						
Omnispace	MSS					
Space42 (merger of Yahsat and Bayanat)	MSS					
Eutelsat/OneWeb	MSS					
Viasat/Inmarsat	MSS					
Iridium	MSS					
SES/Intelsat	MSS					
Globalstar	MSS					
Skylo	MSS					

Parting thoughts: what else should we be thinking about?

the mobile industry exists within a broader, dynamic context

Cognitive Inertia

- overwhelming belief that future looks like today
- new tech brings new opportunities

Growth Mindset

- claims aside, efficiency thinking dominates
- growth examples abound, if not always relevant to everyone (or heard)

Telecoms Cold War

- polarization is impacting all aspects of economy
- tensions drive opportunities (resilience and R&D)



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