



GSMA  
Intelligence

# Global Trends @ MWC26

## Opportunity in an era of upheaval

Presented by Peter Jarich, Head of GSMA Intelligence

## What will we talk about today?

### Birds eye view

- Big themes in a changing world
- Report takeaways
- Why they matter (or should matter)

### Panel insights

- All star line ups (x2)
- Their expert views
- What to expect at MWC

### Outlook

- What to expect in 2026
- X factors/potential surprises
- What it all means

# 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

# Global Mobile Trends

## Our best take on telco



**This report is the latest edition – our 11th – of the Global Mobile Trends series.**

Much has changed since our first publication in 2015. Technology has advanced and companies have come and gone.

As always, the purpose is simple: understand the biggest and most important things happening in telecoms and the broader TMT industries, and explain what they mean for people, companies and governments.

### AI

- AI for telco: the drive to an agentic future
- Telco for AI: eyes on the prize
- On-device: new models, new value?

### 5G

- 5G innovation: the road to 6G
- Autonomous networks: delivering on intent
- Enterprise 5G: verticals walking the walk?

### Security and quantum

- Telco security: countering a fast changing threat landscape
- The quantum impact: the good, the bad, the unknown
- eSim and roaming: the time is right to push adoption

### Satellite and NTN

- The D2D wave: new normal?
- Satellite IoT: old favourites, new pursuits

### Energy innovation

## Our Partners in 2026

Globalstar 

 amdocs



syntelligence

# Speaker line up: a who's who



**Peter Jarich**

Head of GSMA Intelligence,  
GSMA



**John Sweeney**

Vice President & Head of  
Global Sales  
Globalstar



**Marina Martin Garcia**

Group Strategy Director,  
Vodafone



**Mingxi Fan**

Senior General Manager,  
Mediatek



**Dain Hansen**

Director of Global Demand for  
Google Cloud Marketing,  
Google



**Mary Tsilov**

Product Strategy Manager  
Amdocs



**Tim Hatt**

Head of Research and  
Consulting,  
GSMA Intelligence



**Harrison Lung**

Group Chief Strategy Officer  
e&



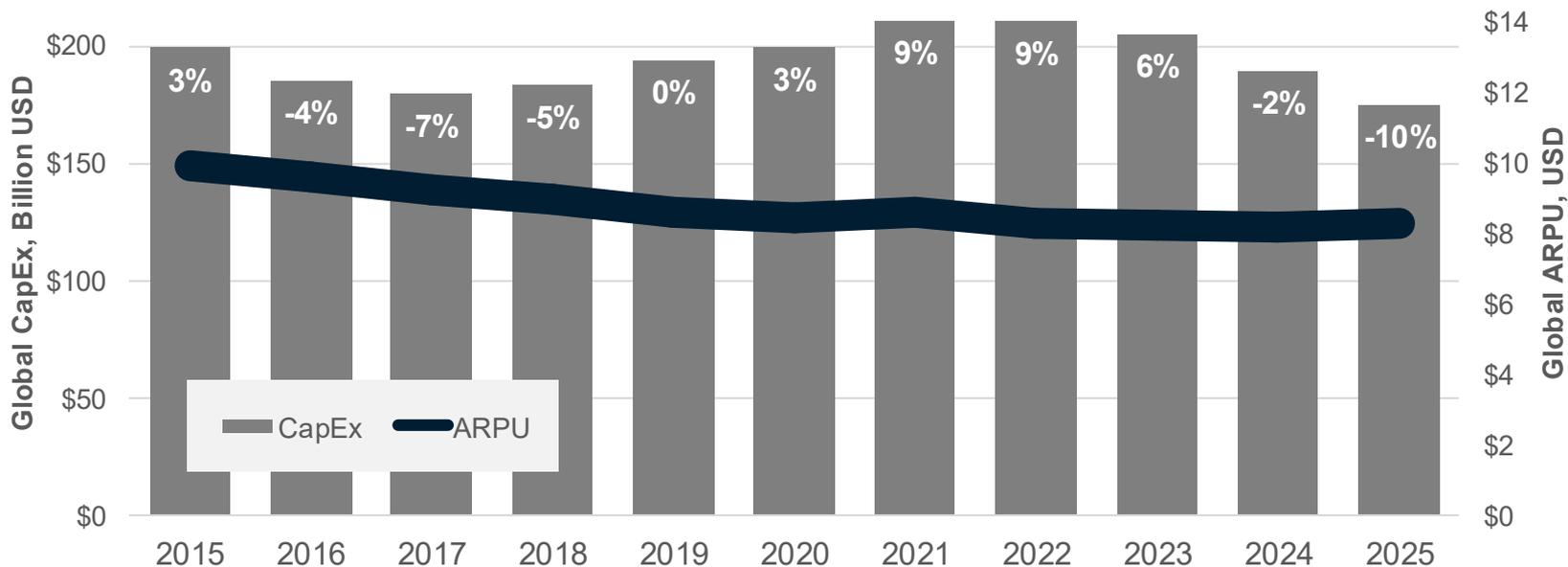
**Prateek Choudhary**

CEO,  
Syntelligence AI

# The Mobile Industry's Financial Sustainability Problem

it's a popular narrative that obscures critical opportunities

Global Mobile ARPU vs. CapEx (incl. CapEx differential over decade)



# AI for Telco

## Operator launches and initiatives reflect internal bias

**Network and customer care dominated telco AI launches in 2025, with monetised AI a minor focus**

Distribution of 2025 telco AI announcements by use case



Source: GSMA Intelligence Telco AI Tracker

# Telco for AI

## What are the options for operators looking to monetize AI?

### Apps

- Enterprise and domain-specific apps
- AI agents and stacks
- Business intelligence apps

### AI engineering tools

- Tools and frameworks to map to enterprise workloads
- Orchestration
- Use-case mapping

### Models (LLM/SLMs)

- Domain-specific model training
- Model training
- AI platforms (enterprise data centre, industrial edge, device edge)

### Infrastructure

- Connectivity layer (intra and inter data centre)
- Cloud infrastructure (centralised/edge), storage, memory
- Compute layer (semiconductors, GPU processors)

Source: GSMA Intelligence

# AI on-device

AI by itself is meaningless, people need to see the value

## AI capabilities are growing in importance; delivering consumers real utility should help sustain momentum

Percentage of consumers who find a feature somewhat or very important.

Base is smartphone users who will replace their smartphone. Aggregate figures across the 12 countries surveyed.

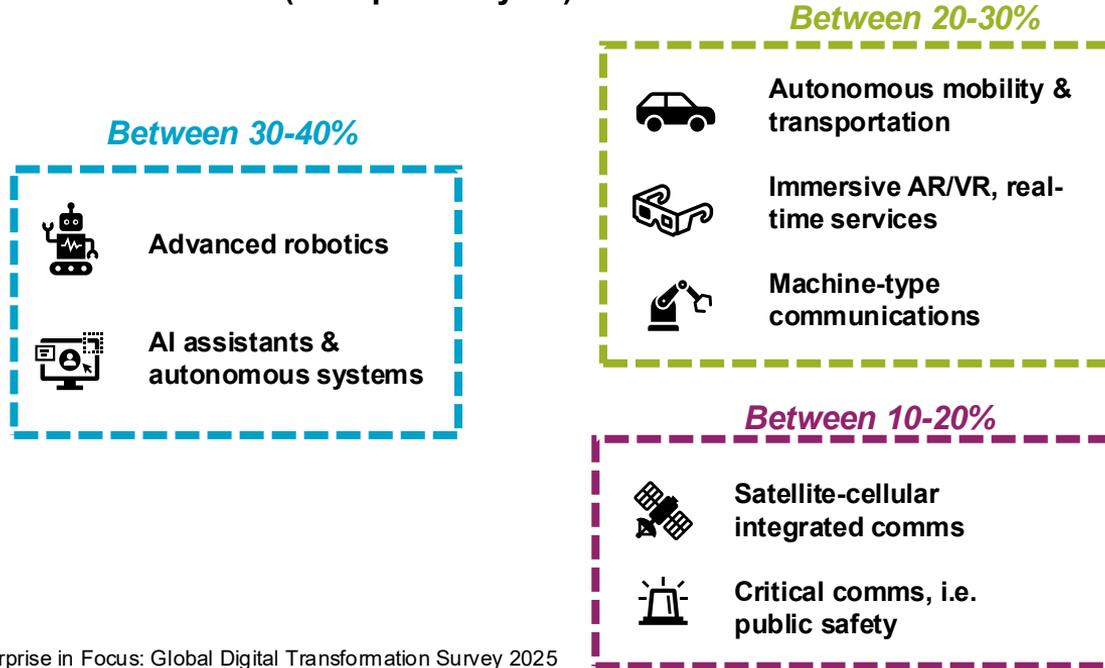


Source: GSMA Intelligence Consumers in Focus Research: Global Consumer Survey August 2025

# 5G Innovation

The road to 6G is business first, tech second

Importance of potential 6G use cases (enterprise buyers)



Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2025

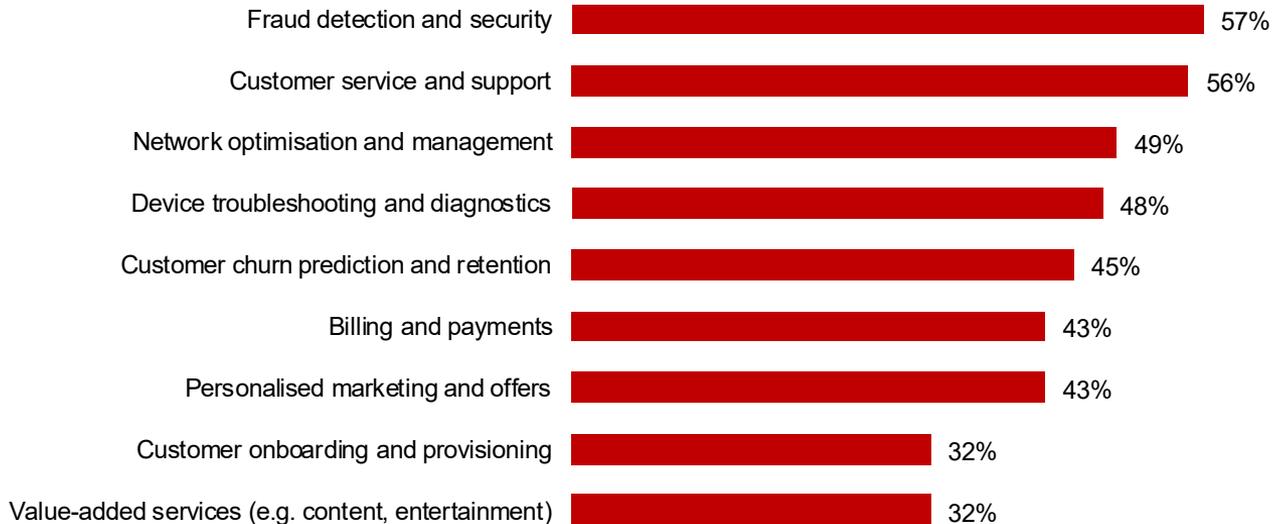
# Autonomous Networks

Agentic's intent to deliver on intent is off to a good start

## Agentic AI implementation is being planned across a range of processes

In which processes have you started to plan implementation of agentic AI?

Percentage of operators



Source: GSMA Intelligence telco automation and assurance survey (N=100 operators, 2025)

# Enterprise 5G

Vendors say that 5G and AI go hand in hand. Enterprises agree.

How much do enterprises plan to spend on digital transformation? Where is investment being targeted?

More than 15%

- AI technology (generative AI and wider AI)
- 5G connectivity and devices (including custom networks)

10-14%

- IoT and big data analytics
- Cloud technology (including edge computing)
- Cybersecurity technologies
- Connectivity and devices beyond mobile (fixed, Wi-fi, satellite)

Below 10%

- Other technologies (including legacy technology)

Malaysia (up and coming example of 5G success)



Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2025

# Telco Security

Operators recognize gap between risk / readiness. That's bad...and good.

## Security Risk vs. Readiness to Counter Perception

How would you rate the threat level across the following threats impacting your organisation?

How would you rate your organisation's readiness to manage the following threat vectors?

Percentage of operators that selected very strong/strong and very high/high.

	Readiness (very strong/strong)	Risk perception (very high/high)	Gap
Data breaches	48%	92%	44%
Distributed denial-of-service attack	72%	81%	9%
Malware	49%	92%	43%

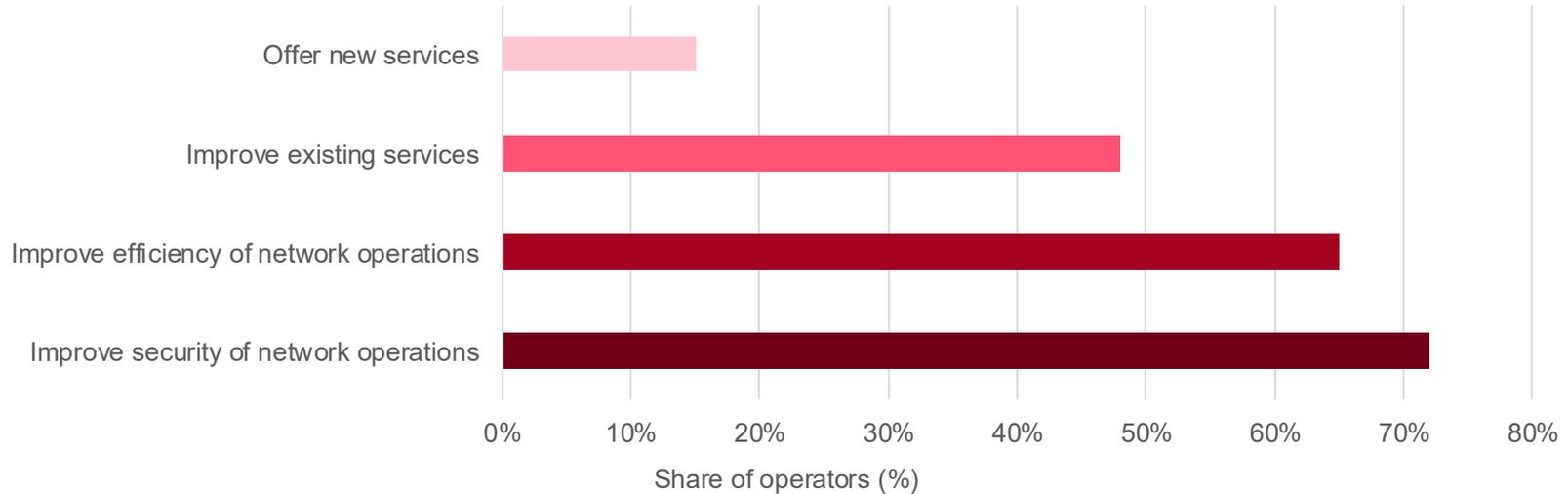
Source: GSMA Intelligence Operator Security Survey 2025

# The Quantum Impact

Security and efficiency are understood. Monetization less so.

## Quantum Tech Benefits @ Telco

What would be the expected benefit of quantum technologies deployment at your organisation? (Select the top 2)

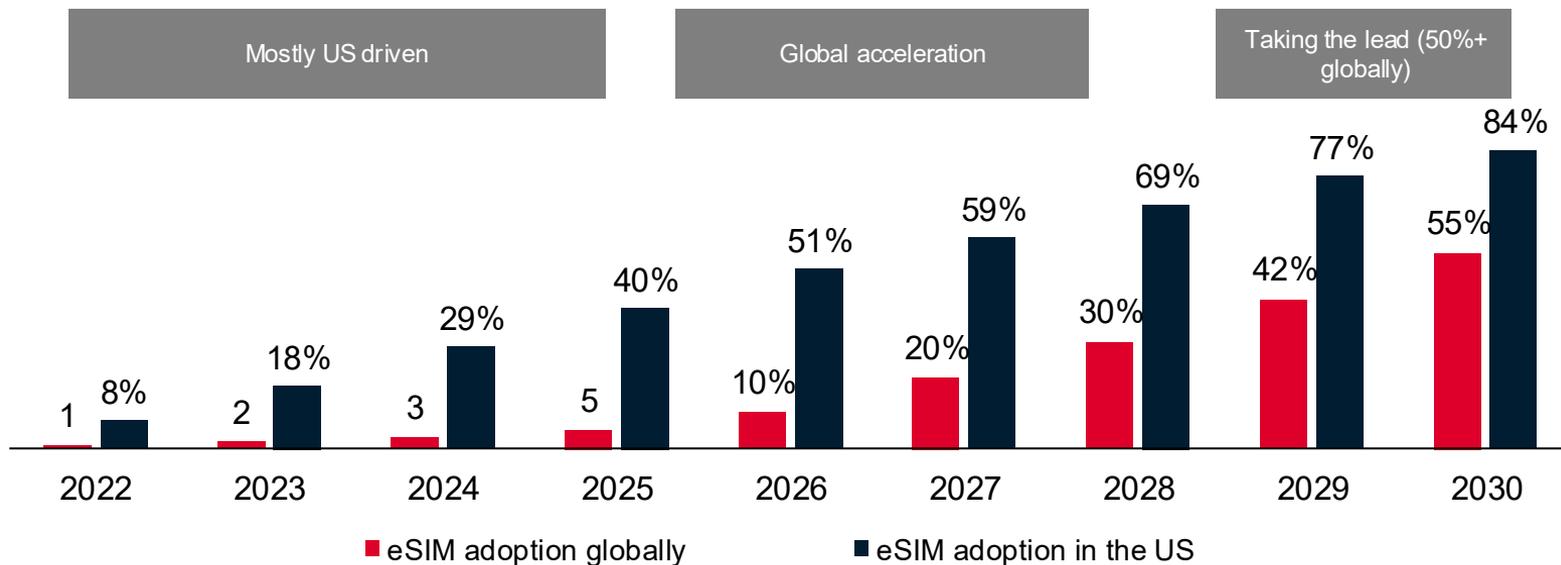


Source: GSMA Intelligence Operator Quantum Survey 2025

# eSIM and Roaming

After a slow start, smartphone eSIM adoption is accelerating

eSIM connections as a percentage of total smartphone connections (installed base)



Source: GSMA Intelligence

# The D2D Wave

Spectrum is no longer just a technical differentiator

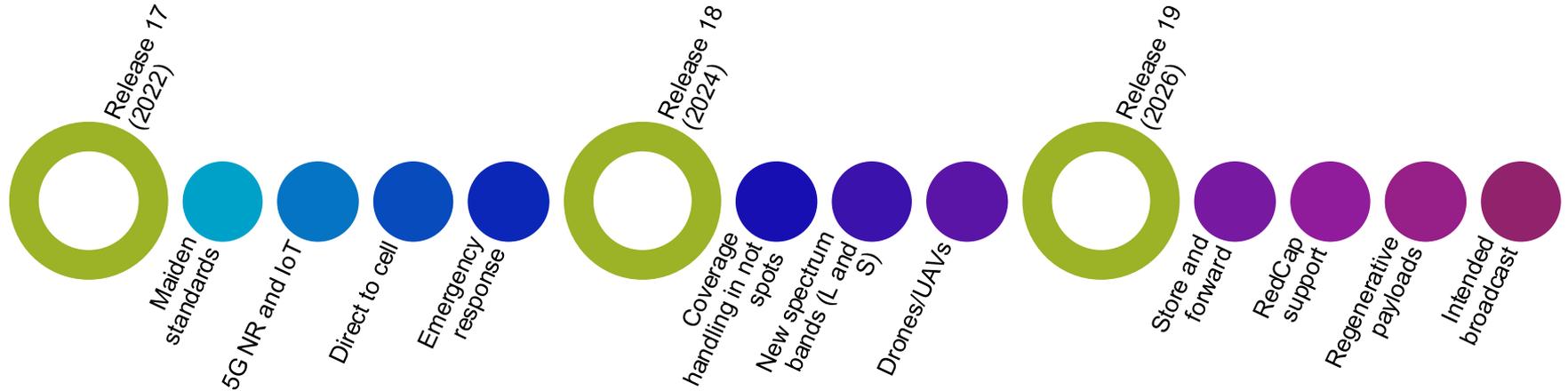
Constellation provider	Spectrum model	L band	S band	MNO holdings (IMT)	Ka	Ku
Starlink	IMT, MSS					
AST SpaceMobile	IMT, MSS					
Lynk	IMT					
Amazon Leo	Ka/Ku					
Omnispace	MSS					
Space42 (Yahsat + Bayanat)	MSS					
Eutelsat/OneWeb	MSS					
Viasat/Inmarsat	MSS					
Iridium	MSS					
SES/Intelsat	MSS					
Globalstar	MSS					
Skylo	MSS					
EchoStar	MSS					

Spectrum holdings as of January 2026. Holdings may change for a given provider over time

Source: GSMA Intelligence

# Satellite IoT

New standards make IoT ready for prime time



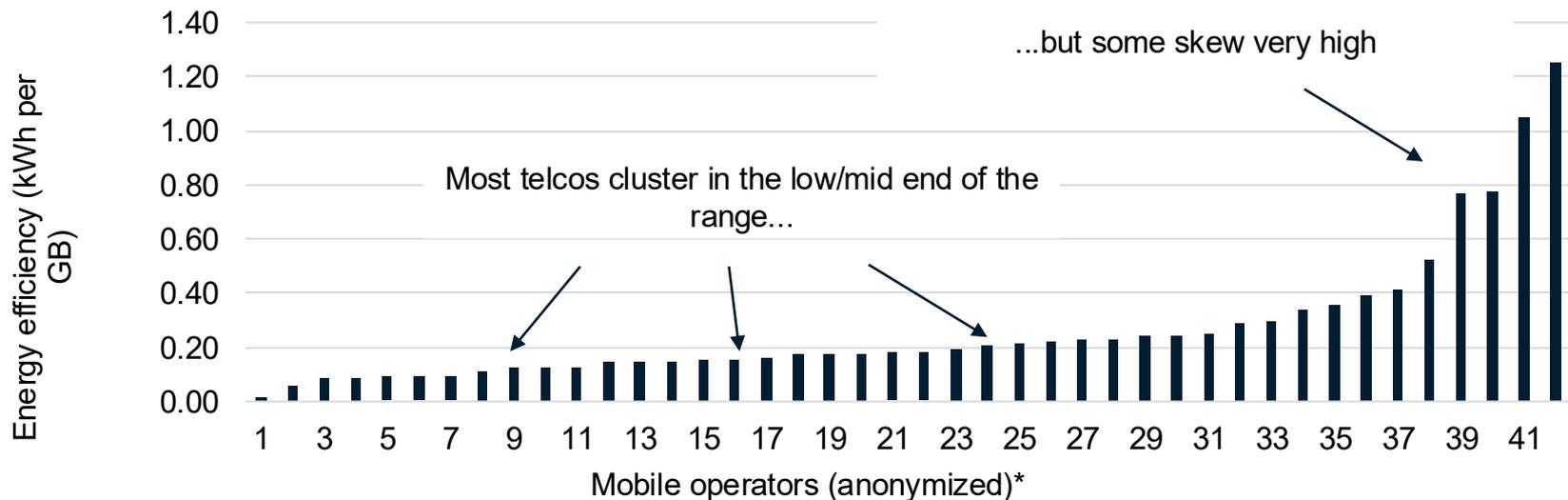
Source: GSMA Intelligence

# Energy Innovation

Continued gains on efficiency, but AI's impact still to be felt

**Glass half full = operator networks keep getting more energy efficient.**

**Glass half empty = some still have a long way to go, especially in Africa**



Figures are the average energy efficiency of each mobile network in the Energy Benchmark expressed at a country level  
Source: GSMA Intelligence Energy Benchmark (2026)



# Thank you

Peter Jarich, Head of GSMA Intelligence

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# GSMA Intelligence at MWC26



GSMA INSIGHTS HUB

## Global Mobile Trends 2026: Analyst Insights from GSMA Intelligence

10:00 - 11:00 • Hall 2, CC2 GSMA Insights Hub Stage

GAME CHANGERS

PHYSICAL



GSMA INSIGHTS HUB

## Energy and Towers Efficiency Benchmark

11:30 - 12:30 • Hall 2, CC2 GSMA Insights Hub Stage

CLIMATE TECH

PHYSICAL



ROUNDTABLES & SUMMITS

## Satellite and NTN Summit

10:00 - 13:00 • Hall 6, GSMA Summits Stage

INTELLIGENT INFRASTRUCTURE

PHYSICAL



ROUNDTABLES & SUMMITS

## AI factories: how to build, how to monetise

16:30 - 17:30 • Hall 2, CC2.3 GSMA Insights Hub

AI4ENTERPRISE

PHYSICAL



GSMA INSIGHTS HUB

## ISAC: Precision Positioning for industry, mission-first defence...or both?

11:30 - 12:30 • Hall 2, CC2.1 MWC Roundtable Room 1

INTELLIGENT INFRASTRUCTURE

PHYSICAL



GSMA INSIGHTS HUB

## Mapping mobile's global coverage: Myths, realities, and why high-resolution insights matter for progress

11:30 - 12:30 • Hall 2, CC2 GSMA Insights Hub Stage

TECH4ALL

PHYSICAL



FLAGSHIP SESSION

CONFERENCE

## MWC 26: What Did We Learn?

12:30 - 13:15 • Hall 6, Johnson Stage

Experience with Leaders Conference or VIP Pass

GAME CHANGERS

PHYSICAL



ROUNDTABLES & SUMMITS

## Small business vs. Big opportunity: Can telcos succeed in B2B beyond large enterprises?

10:00 - 11:00 • Hall 2, CC2.3 GSMA Insights Hub

INTELLIGENT INFRASTRUCTURE

PHYSICAL



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