Analyst Insights:
Unveiling the 2024 Global Trends Report

Hosted by GSMA Intelligence

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GSMA Intelligence

Who are we? What do we know?

GSMA Intelligence is the definitive source of mobile industry insights, forecasts, and research, used around the world. Our insights cover every mobile operator, network, and MVNO in every country worldwide.

COMPREHENSIVE DATA PLATFORM	INSIGHTFUL RESEARCH	EXPERT ANALYSIS	BESPOKE CONSULTING	EVENT SUPPORT

Who we work with

- Mobile Network Operators
- Regulatory Bodies
- Government Departments
- Financial Corporations
- Cybersecurity Firms
- OEMs and Manufacturers
- Technology Companies
- Consulting Businesses

BY THE NUMBERS

7/10

of Forbes' Top digital companies worldwide, rely on our data and insights

50m+

individual datapoints covering everything from operational to economic

4,600+

networks tracked, spanning every country

9/10

of the top Telecoms in the world work with GSMA Intelligence

Global Trends: insights, surprises, and implications

This report is the latest edition – our 9th – 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.

- 5G's next wave
- 5G-Advanced
- Fixed wireless access
- Generative AI
- Cloud and edge
- The future of entertainment
- Private wireless networks
- eSIM
- Satellite and NTNs
- Sustainability and circularity

Our partners in 2024

Distilling the future

How do all of 2024's trends come together?

5G's Continued Progress…

- Adoption vs. Monetization
- FWA as a Breakout
- 5G-Advanced on Horizon

…With "New" Tech Drivers

- Gen AI's art of the possible
- Cloud / edge balancing act
- Private 5G and eSIM come of age

…And New Biz Dynamics

- Circularity vs. efficiency
- Entertainment diversity
- NTN: biz trumps tech innovation

5G's Next Wave

Fastest mobile broadband uptake. Monetization a work in progress.

Fastest in history

Headline 5G penetration now around 20%.

Drivers

Uptake helped by...

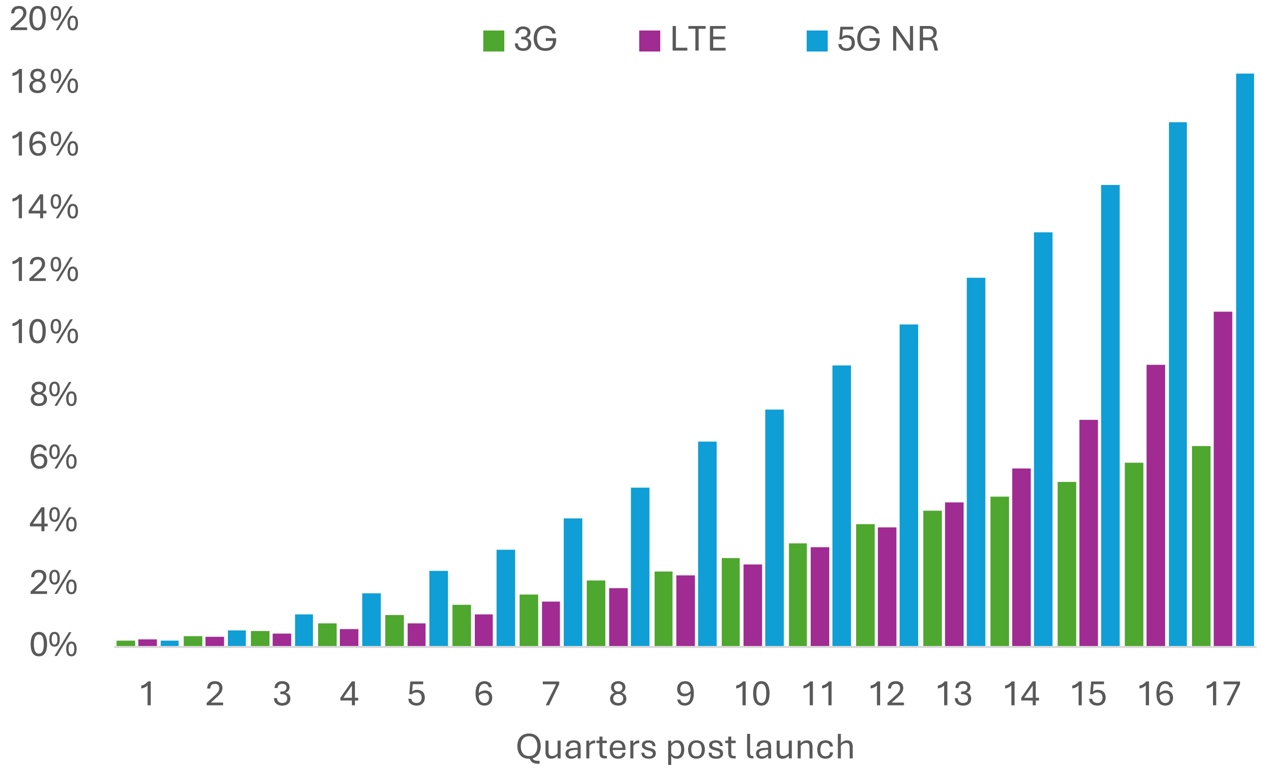
- Handsets
- Coverage
- Speeds
- Pricing

Growth imperative

Mobile revenue growth still challenged. SA and B2B momentum still ramping.

Mobile Broadband Penetration: Global Connections

Source: GSMA Intelligence



5G Advanced

Driving at ROI on the road to 6G

Solution vs. problem

New tech often begs the question of why it's needed. 5G-Advanced faces the same scrutiny.

Tech vs. services

Most-cited capabilities and use cases focus on tech innovation. BUT, they must be linked to monetized services: metaverse, connected things, efficient media, etc.

B2B monetization

A common theme across 5G-Advanced priorities is B2B support.

5G-Advanced priorities

Top use cases		
5G multicast	Low-cost IoT	Satellite integration

Top technology capabilities			
Improved uplink	Network slicing	Enhanced security	Edge compute

Source: GSMA Intelligence

Fixed Wireless Access

Everyone's favourite 5G use case begins to mature.

Breakout growth

5G FWA up 55% in 2024, outpacing success 4G FWA was able to manage.

Why FWA?

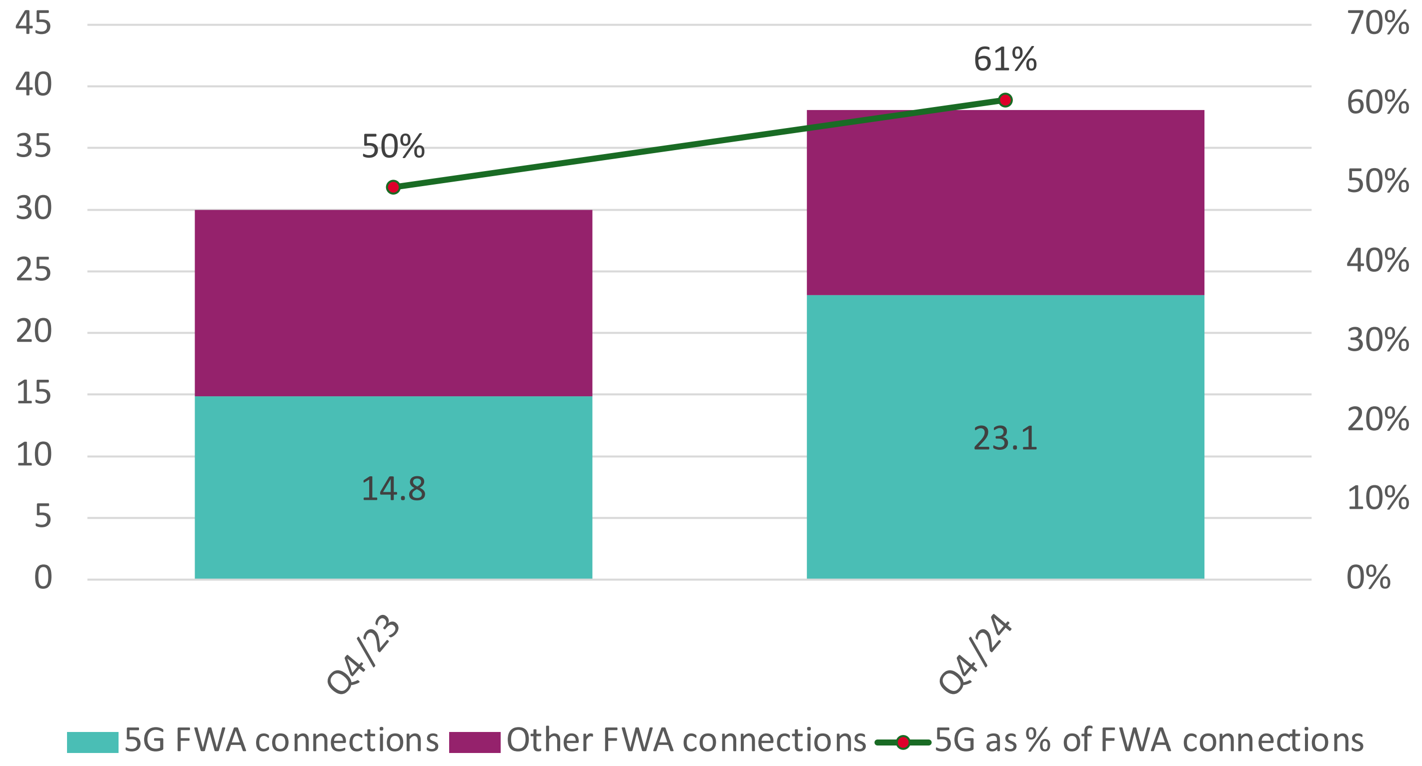
Key to growth: monetizing 5G spectrum and network investments into a new customer base.

What next for FWA?

- Competing
- Complementing
- Converging
- 5G-Advanced

FWA connections show strong growth

Source: GSMA Intelligence



Generative AI

Scratching the surface en route to the Generative Telco

Making money vs. saving money

Where to focus Gen AI efforts: internal or external?

Network wins early battle

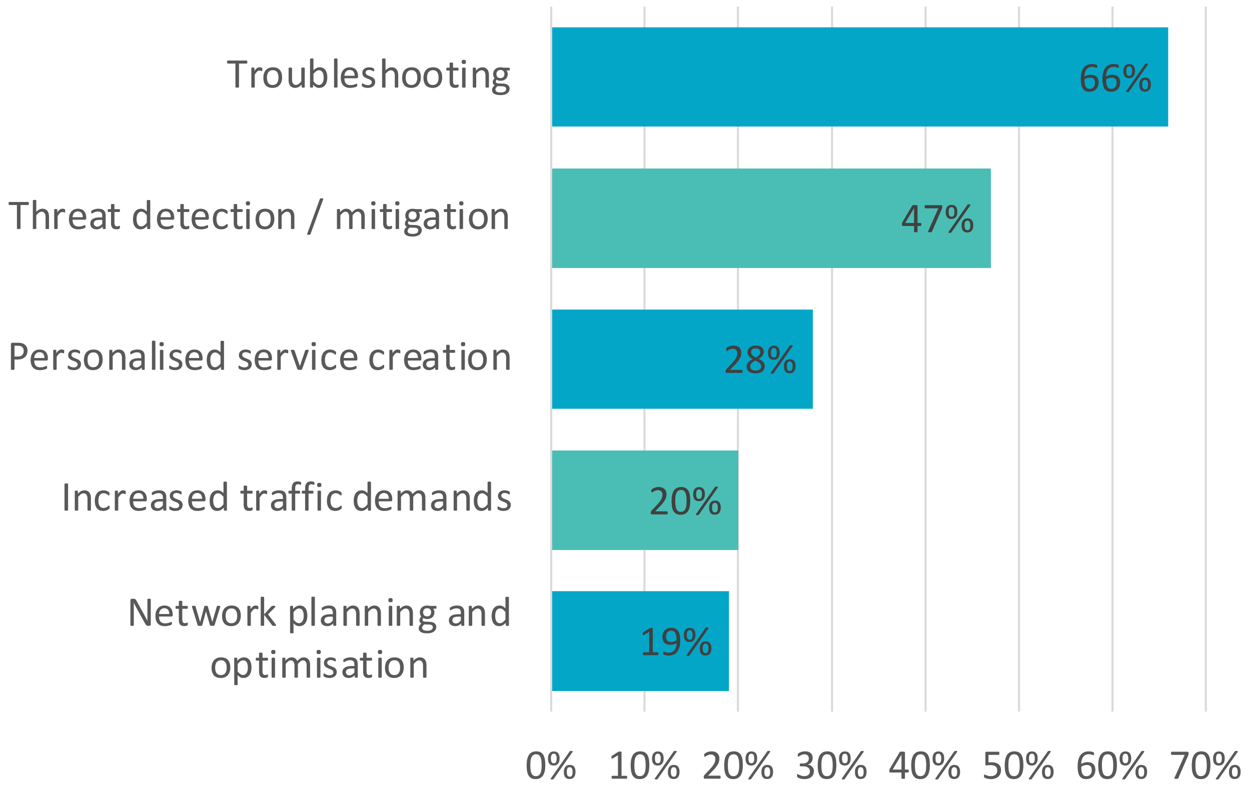
Infrastructure-related use cases dominate initial telco efforts – but fall well short of full value prop.

Growth imperative

New revenues and customer experience improvements drive telco strategy priorities. Gen AI priorities must follow.

Greatest business impact from GenAI deployment

Source: GSMA Intelligence Operators in Focus: Network Transformation Survey 2023



Cloud and edge

Getting the industry's compute architectures right

It takes a village

Where traffic is processed is just as important as the rise in traffic.

Shifting trends

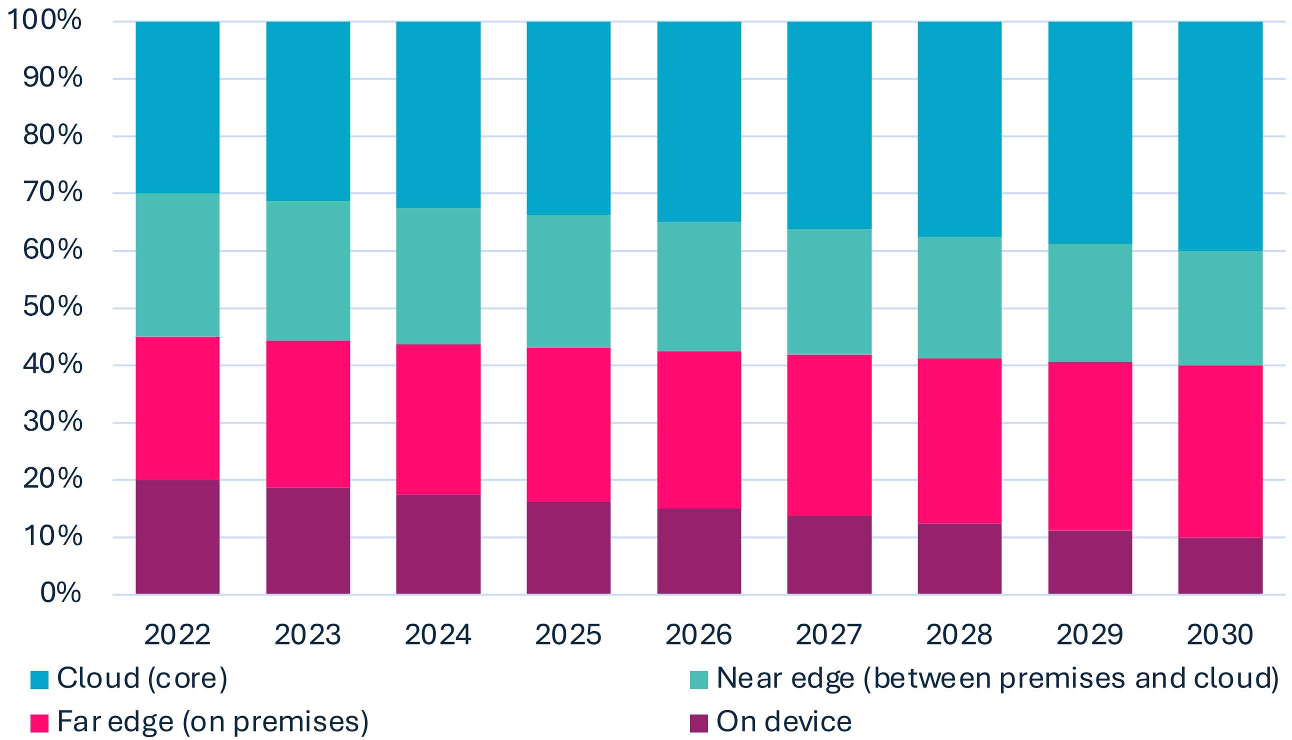
Cloud and on-premises edge to soak up the majority of incremental traffic through end of the decade.

Local digitalization

Edge focus underscores broader trend of B2B clients seeking on-prem compute; MEC and cloud compute are two sides of the same coin in facilitating private wireless.

Telco Traffic Distribution: Expectations through 2030

Source: GSMA Intelligence Operators in Focus: Network Transformation Survey 2023



Future of entertainment

Strategy diversification as the new imperative

Horses for courses

Telco strategies for video are diverse: vertical integration, premium video content acquisition, partnerships with third-party streamers.

Distribution Dominates

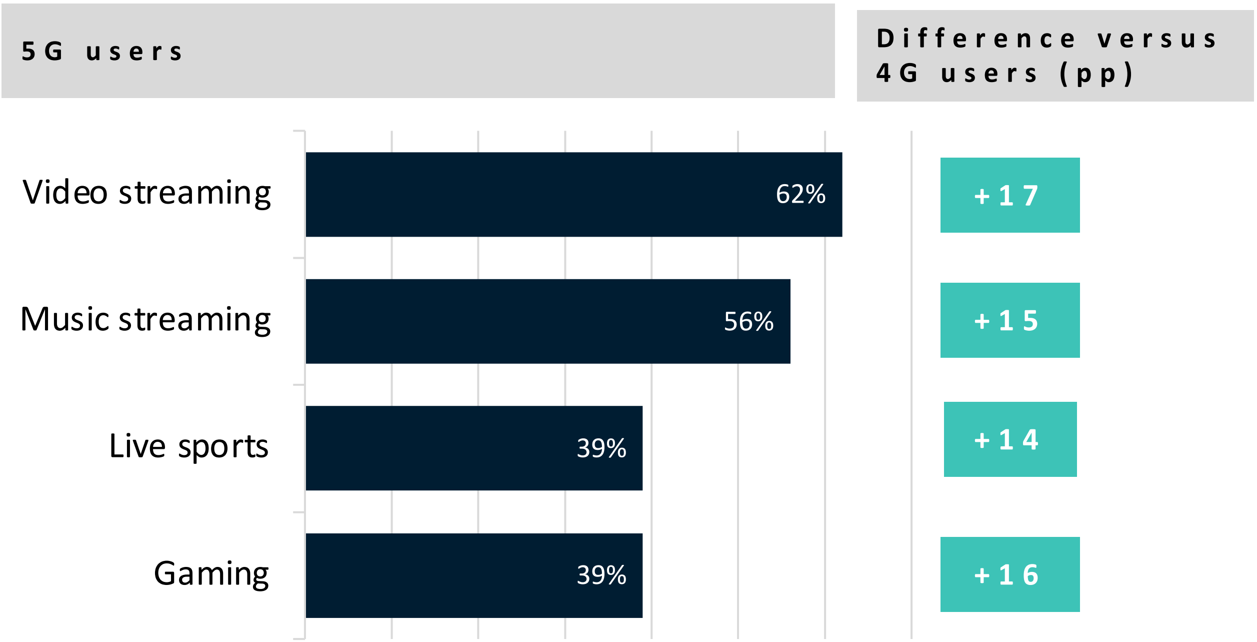
Distro partnerships are most common, but also diverse: carriage agreements, tech and service integrations, revenue shares.

Diversification and churn

Offset of low growth in mobile/fixed connectivity and churn reduction remain the focus, aided by bundling demands. Edge focus underscores broader trend of B2B clients seeking on-prem compute; MEC and cloud compute are two sides of the same coin in facilitating private wireless.

Digital entertainment offerings: What consumers want packaged with mobile subscriptions

Source: GSMA Intelligence



Private wireless

Slow burn, but with strong demand signals

Expanding customer base

Start of 2023: 1-in-3 operators had more than 200 private wireless customers. End of 2023, 1-in-2 had surpassed that level across their customer base.

Market signals

Enterprise customer feedback is positive. Positive sentiment is there for 2/3rd of the customer base, with 25% seeing operational AND financial returns.

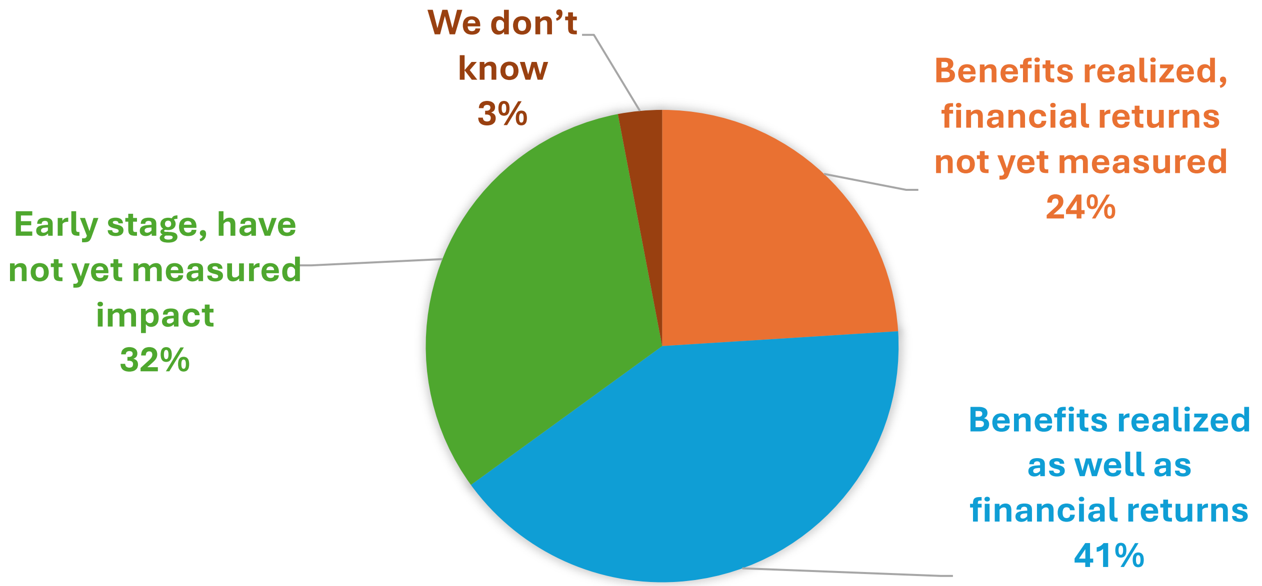
What next?

SA and 5G-Advanced only extend the value of mobile.

Customer experience with EXISTING 5G private wireless networks

Percentage of operator respondents, globally

Source: GSMA Intelligence Operators in Focus: Mobile Operator Enterprise Survey 2023



eSIM

Scaling smartphone and going beyond

Gathering momentum

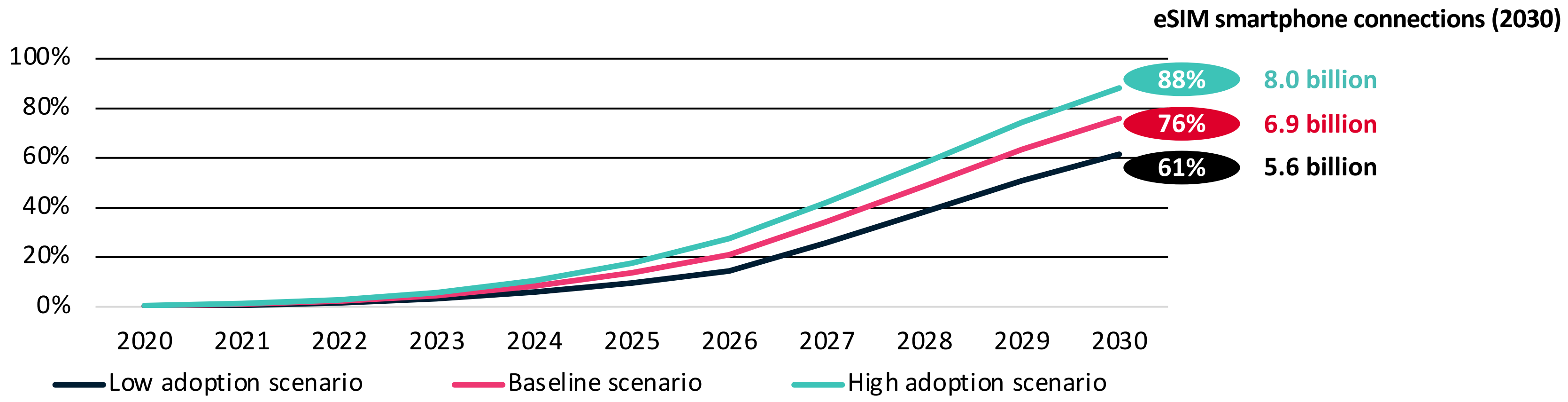
After slow start, eSIM smartphone adoption gains momentum over the next two years. By 2025/2026…

- Most operators will offer commercial eSIM service to their smartphone customers, and
- eSIM-only phones (a major factor driving eSIM adoption) will be more widespread globally

eSIM smartphone connections to 2030

Percentage of of total smartphone connections (installed base) globally

Source: GSMA Intelligence



Key milestones: baseline scenario (globally)

- **2025:** 1 billion eSIM smartphone connections
- **2028**: half of smartphone connections use eSIM
- **2030**: nearly 7 billion eSIM smartphone connections

Satellite and NTNs

Finally passing an inflection point

Reach

Telco-satellite partnerships now cover addressable subscriber footprint of more than 2 billion

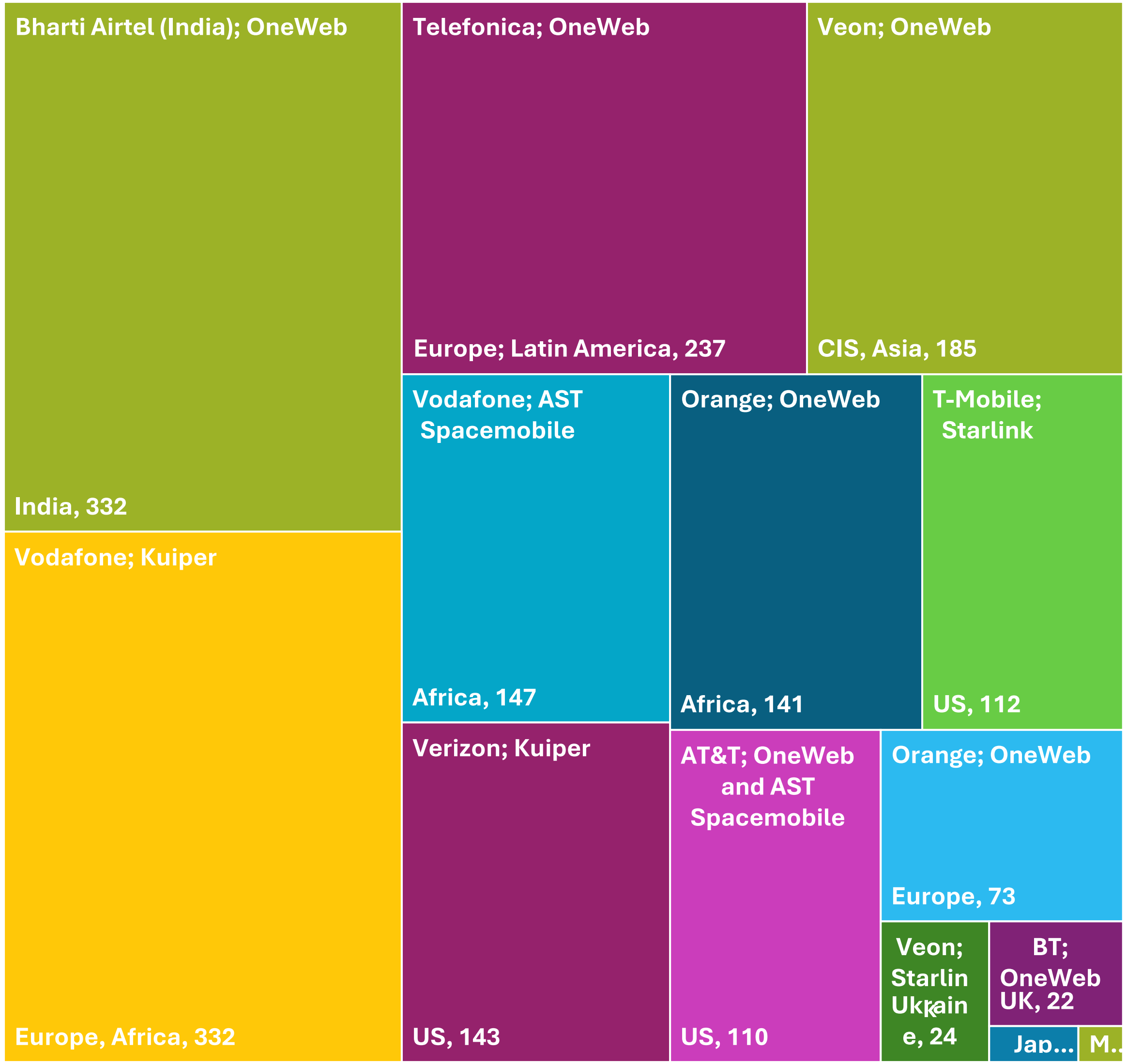
More than a developing world problem

Early activity focused Sub-Saharan Africa. Many efforts and partnerships now cover Europe, the US, Canada and parts of rural Australia.

How big?

GSMA Intelligence estimates an annual run rate of $30–35 billion by 2035, equivalent to a boost of 2.0–2.5% on current mobile revenues

Telco-Satellite partnerships: constellations and reach



Sustainability

Evolving past energy efficiency. Making circularity the norm..

Definitions

- Basic but still important
- Key to help move from concept to commercial reality

Market mechanisms

- Certifications
- Secondary trading markets (e.g. metals)

Operator roles vs. others

- Operators are among biggest buyers of handsets, CPE and other H/W
- However, OEMs and vendors are closer to manufacturing process…and by extension, product design
- Coordination key

Deployments and need for proof points

- Only around 15% of handsets recycled so far
- Upping this, and expanding to network equipment, needs case studies and proof points on process and value gain

Key circularity practices for operators

Source: GSMA Intelligence

Supply Chain

- Sourcing of sustainable materials
- Reusing and refurbishing products
- Sales of refurbished devices
- Device recycling
- Design equipment for end-of-life disposal
- Tracking system metrics

Operations

- Reusing and repairing network equipment
- Recycling network equipment
- Refurbishing network equipment
- Resale of network infrastructure
- Network softwarisation

Products and Services

- Attractive device take-back programmes
- Device repair offers
- Device-as-a-service
- Raising consumer awareness of the impact of device disposal

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