

Research Agenda Q3 2024, Q4 2024

DATE

July 2024

GSMA

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

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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Q3 2024 – industry research

	<u>Mobile Operators & Networks</u>	<u>Fixed, TV & Convergence</u>	<u>IoT & Enterprise</u>	<u>Digital Consumer</u>	<u>Spectrum</u>
Data	<p>Mobile markets Quarterly forecast update: connections and revenues (to 2030)</p> <p>Mobile capex Forecast update (to 2030)</p> <p>Unique mobile subscribers New metrics: adult and smartphone unique mobile subscribers (forecast to 2030) NEW</p>	<p>Fixed and pay-TV markets Quarterly forecast update: connections (to 2030)</p> <p>Fixed and pay-TV markets Quarterly product tracker update: commercial services</p> <p>Pay TV Consumer behaviour for pay-TV services (dashboard, survey-based)</p>	<p>Cellular IoT markets Quarterly forecast update: licensed cellular IoT connections (to 2030)</p> <p>IoT ecosystem revenue Forecast update (to 2030)</p>	<p>Consumers in Focus Gamer behaviour (dashboard, survey-based)</p> <p>OEM smartphone market share Country-level data NEW</p>	<p>Spectrum intelligence 5G and previous generation networks (auctions, assignments, pricing, spectrum migration)</p> <p>Network sunsets Tracker of operators switching off 2G and 3G networks (with outlook to 2030)</p>
Major reports	<p>5G in Context Global 5G and network landscape (quarterly series)</p> <p>Non-terrestrial networks Trends and developments across networks, spectrum, partnerships, use cases and more (quarterly series)</p>	<p>Fixed and pay-TV markets New developments and future outlook (quarterly series)</p> <p>Pay TV Major trends shaping the market to 2030, including technology, consumer demand (survey-based) and competition</p>	<p>Operators in B2B: manufacturing Report (and dashboard) outlining operator strategies, offerings, plans, expectations and more (survey-based)</p> <p>Operators in B2B: financial services Report (and dashboard) outlining operator strategies, offerings, plans, expectations and more (survey-based)</p>	<p>Gaming Major trends shaping the market, including technology, consumer demand (survey-based) and competition</p>	<p>Spectrum landscape New insights and trends to watch (quarterly series)</p> <p>Network sunsets Pace of 2G and 3G network sunsets globally and by region, with drivers and outlook to 2030 (quarterly series)</p>
Other research	<p>Spotlights: weekly reports covering important trends, developments and events in the telecoms/digital ecosystems and their implications</p> <p>Insightful charts: a monthly graphic providing a visual way of telling an important story or development in the industry – turning data into insights</p> <p>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</p>				

Q3 2024 – regional, economic and social research

	<u>Region in Focus</u>	<u>The Mobile Economy</u>	<u>Economic and Social Impact</u>	<u>Industry Megatrends</u>
Major reports	Asia Pacific	The Mobile Economy Asia Pacific 2024	6 GHz: A cost benefit analysis of alternative licensing options for mobile services	Telco security innovation: North Africa
	China			The AI telco (Radar)
	Europe			AI, part 1 (data and systems)
	Latin America			Monetising the enablement effect
	Middle East and North Africa			
	North America			
	Sub-Saharan Africa			

Q4 2024 – industry research

	<u>Mobile Operators & Networks</u>	<u>Fixed, TV & Convergence</u>	<u>IoT & Enterprise</u>	<u>Digital Consumer</u>	<u>Spectrum</u>
Data	<p>Mobile markets Quarterly forecast update: connections and revenues (to 2030)</p> <p>VoLTE/VoNR Forecast update: launches and connections (to 2030)</p> <p>Mobile data traffic Forecast update (to 2030)</p> <p>Operators in Focus Network transformation dashboard (survey-based)</p>	<p>Fixed and pay-TV markets Quarterly forecast update: connections (to 2030)</p> <p>Fixed and pay-TV markets Quarterly product tracker update: commercial services</p>	<p>Cellular IoT markets Quarterly forecast update: licensed cellular IoT connections (to 2030)</p> <p>IoT market update Forecast update: connections (to 2030); cellular and non-cellular; consumer and enterprise. Dashboard and report</p> <p>Digital transformation dashboard Insights into enterprise digital transformation (survey-based) NEW</p>	<p>Consumers in Focus eSIM consumer behaviour (dashboard, survey-based)</p> <p>eSIM market tracker Tracking devices and services launches, forecasting adoption through to 2030</p>	<p>Spectrum intelligence 5G and previous generation networks (auctions, assignments, pricing, spectrum migration)</p> <p>Network sunsets Tracker of operators switching off 2G and 3G networks (with outlook to 2030)</p>
Major reports	<p>5G in Context Global 5G and network landscape (quarterly series)</p> <p>Non-terrestrial networks Trends and developments across networks, spectrum, partnerships, use cases and more (quarterly series)</p> <p>Operators in Focus Network transformation report (survey-based)</p>	<p>Fixed and pay-TV markets New developments and future outlook (quarterly series)</p> <p>Telco M&A New trends and developments across traditional core telecoms services and services beyond connectivity</p>	<p>Digital transformation of enterprises and vertical sectors Progress, investment plans, priorities, benefits and challenges (survey-based) NEW</p> <p>From telco to techco Operator progress beyond connectivity, revenue growth, new trends and developments</p>	<p>eSIM for consumers State of the market (devices, services), new trends and developments, consumer behaviour, adoption forecast to 2030</p>	<p>Spectrum landscape New insights and trends to watch (quarterly series)</p> <p>Network sunsets Pace of 2G and 3G network sunsets globally and by region, with drivers and outlook to 2030 (quarterly series)</p> <p>Network landscape Network developments: trends and insights (5G SA, NTN, open RAN, VoLTE and more) NEW</p>
Other research	<p>Spotlights: weekly reports covering important trends, developments and events in the telecoms/digital ecosystems and their implications</p> <p>Insightful charts: a monthly graphic providing a visual way of telling an important story or development in the industry – turning data into insights</p> <p>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</p>				

Q4 2024 – regional, economic and social research

	<u>Region in Focus</u>	<u>The Mobile Economy</u>	<u>Economic and Social Impact</u>	<u>Industry Megatrends</u>
Major reports	Asia Pacific	The Mobile Economy North America 2024	Africa: beacon for renewables? Digital Nations Asia Pacific	AI, part 2 (strategy and culture)
	China	The Mobile Economy Sub-Saharan Africa 2024	Fintech strategies	GSMA Open Gateway: State of the Market
	Europe	The Mobile Economy Europe 2024	5G in Africa Tech in Ghana	Satellite and D2D (Radar)
	Latin America	The Mobile Economy Middle East and North Africa 2024	Mobile broadband and poverty reductions in Latin America	
	Middle East and North Africa		Digital Africa Index	
	North America		QoS Regulations in Asia Pacific	
	Sub-Saharan Africa		Spectrum pricing: Türkiye Mobile Money Digital Finance for All: Market Assessment	

2024 research themes



Operators seeking new growth in connectivity and beyond

The technologies, services and business models driving change



Changing shape of telecoms networks

Impact of new technologies and network capabilities on industry transformation



Advanced AI technology takes hold

The generative AI world and its impact on the telecoms sector



Scaling the B2B opportunity in the 5G era

Turning growing enterprise digitisation into a scalable business opportunity



Rise of eSIM as mainstream technology

Building on tech and service availability to drive customer adoption



Consumer 5G monetisation quest

Making 5G a truly global story and monetising consumer and FWA use cases



Device innovation imperative

Balancing tech innovation and shifting consumer preferences



Reshaping services in the digital era

XR, the metaverse, new digital experiences and bundle approaches



Maximising the value of spectrum

Effective spectrum management to deliver its full potential



Bridging mobile connectivity investment gaps

Supporting digital inclusion, digital transformation and digital economy growth



Energy efficiency and sustainability at full strength

Advancements in green networks and sustainable practices across industries

[Click here for full report](#)

Themes cut across most content modules (research and data)

	<u>Mobile Operators & Networks</u>	<u>Fixed, TV & Convergence</u>	<u>IoT & Enterprise</u>	<u>Digital Consumer</u>	<u>Spectrum</u>
Operators seeking new growth in connectivity and beyond	●	●	●	●	●
Changing shape of telecoms networks	●	●			●
Advanced AI technology takes hold	●	●	●	●	
Scaling the B2B opportunity in the 5G era	●	●	●		●
Rise of eSIM as mainstream technology	●		●	●	
Consumer 5G monetisation quest	●	●		●	
Device innovation imperative	●	●	●	●	
Reshaping services in the digital era	●	●		●	●
Maximising the value of spectrum	●		●	●	●
Bridging mobile connectivity investment gaps	●		●	●	●
Energy efficiency and sustainability at full strength	●	●	●		●

GSMA Intelligence: our content, data, research and value

	<u>Mobile Operators & Networks</u>	<u>Fixed, TV & Convergence</u>	<u>IoT & Enterprise</u>	<u>Digital Consumer</u>	<u>Spectrum</u>
50 million data points updated daily. 170 data metrics modelled and forecast to 2030. More than 200 reports published annually.					
Data	<p>Covers 782 mobile operators and 343 mobile metrics across 239 markets</p> <p>Historical data and forecasts to 2030</p> <p>Mobile subscribers/connections, network and operational data, ARPU and financials</p> <p>Operator Network Transformation Survey</p>	<p>Covers 180 FBB service providers and 183 pay-TV providers across 36 of the world's largest markets (90% of global FBB connections)</p> <p>Historical data and forecasts to 2030</p> <p>Fixed voice, broadband and pay-TV connections, bundling and convergence, financials</p> <p>Product and Service Tracker</p>	<p>IoT connections and revenue</p> <p>Historical data and forecasts to 2030</p> <p>Cellular and non-cellular connections, enterprise and consumer connections across vertical use cases</p> <p>Operator Enterprise Opportunity Survey</p> <p>Enterprise Survey: digital transformation of vertical sectors</p>	<p>Global consumer survey of major markets</p> <p>Interactive consumer survey dashboards covering 5G, gaming, video services, devices, eSIM, the metaverse, and generative AI. Filters for specific consumer segments</p> <p>eSIM: devices, services, adoption forecast to 2030</p>	<p>Tracker of spectrum auctions, assignments, pricing, licence duration and obligations</p> <p>Granular data covering 200+ countries and 1,000+ operators worldwide, from 1980 to today</p> <p>Spectrum for 5G and previous generation networks</p> <p>Network sunsets and rollout of 5G SA, open RAN, and VoLTE</p>
Other research	<p>Spotlights: weekly reports covering important trends, developments and events in the telecoms/digital ecosystems and their implications for ecosystem players</p> <p>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</p> <p>Insightful charts: a monthly graphic providing a visual way of telling an important story or development in the industry – turning data into insights</p> <p>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</p> <p>Regional research: Mobile Economy reports and Region in Focus series examining major trends (technology, market, policy and regulation)</p> <p>Bespoke consulting: on-demand, customised research on industry topics including megatrends, technology/service innovation, economic and social Impact of mobile technology and spectrum</p>				

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